NEW DIRECTIONS

**Quality Improvement in Financial Management,
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Green Harvest
Commercial Paper Adds Flexibility to UW's Debt Program

By Chris W. Malins

Traditionally, when the UW has needed funds for capital projects, it has either turned to the State of Washington for funding or issued bonds. While in most cases, these are good choices, there are times when other borrowing instruments make more sense. Issuing Commercial Paper is a method for assuring the lowest rates when funding construction projects.

What is Commercial Paper? Commercial Paper, also known as CP, short term revenue notes, or just short term paper, is a borrowing tool that large corporations and public institutions use to pay for capital project construction and to fund operating needs. UW issued CP would be tax-exempt and would therefore have a lower rate that corporate issued CP. The "maturity" date (ie the date that the amount borrowed is due) for CP can range from 1 to 270 days. A CP dealer works with the issuer (i.e. the UW) to determine the optimal maturity for newly issued paper. When the CP matures, the interest and principal can either be paid off with cash or by issuing additional CP. Since short term interest rates are typically the lowest, CP offers the lowest cost of financing.

UW plans to mainly use CP as interim funding for capital projects during their construction. When construction is completed, the CP will be paid off by issuing long term bonds. By matching the short term debt to the short term capital needs, the lowest interest cost will be achieved over time. Although the main purpose of the CP program is funding buildings under construction, it can also be used for other purposes like real estate purchases and operating needs. Among the many benefits of CP are its flexibility as to maturity, low cost, and ease of use.

The UW's CP program was approved by the Board of Regents in July and will be up and running by early September. In fact, it will be used for the very first time for the UW's acquisition of the Safeco properties in late September.

Farewell, My Spreadsheet
Debt Database Debuts, Delivers!

by Chris W. Malins

Nostalgia is a nice thing. People covet old homes, cars, furniture, even old Pez dispensers. But nobody likes an old spreadsheet. And an old, unruly spreadsheet is what the debt area in Treasury has been using for many years to manage outstanding debt, payments, and future transactions. Like a pair of rabbits in the spring, this old spreadsheet has multiplied over the years, with additional tabs, files, rows and columns making it unwieldy, redundant, and most of all inefficient. This is not the kind of antique anyone would want on the "Roadshow."

A happy confluence of events led to the development of a solution to this problem. First was the addition of Wayne Sugai to the Debt area in October of 2005. Wayne added yet another voice to the chorus demanding a better system for managing debt data and was a big part of the brainstorming discussions that culminated in a solution. The second important event was when Sam Senturia came on board in Treasury and agreed to help develop an Access database for the debt portfolio. Sam is trained in database design and has worked in MAA, GCA, and Payroll helping them with their systems needs.

Sam worked with the debt group (Wayne and Chris Malins) to determine the needs for this database. He had us identify the types of information that we wanted to track, the format of the information, any regular queries that needed to be made from the data, and the best way to enter data into the database. With this information in hand, Sam created a test database with entry forms, queries, and a way to dump the data into Excel. Many subsequent discussions followed, and each time the database improved. The application is now chock full of data and is used daily in the Treasury Office. As the database has developed over the last few months, a few bugs have been fixed and even a few (gasp!) keying errors were discovered.

The next step is to make the database available to other interested departments on a read-only basis. Financial Accounting and the Budget Office have both expressed interest. It is a lot of fun and quite rewarding to be part of the overhaul of an outdated system. The upfront work can be daunting, and good planning is important, but when the system is up and running at 100%, the new debt database won't be considered an "antique" for many years to come.

The World According to GLARP

by Jon Vanvick & Bin Chen

So, you'd like to see what makes up the stated assets and liabilities of the University. Who you gonna ask, Ghost Busters? Hardly! Until recently, the answer to that question was known only to the people closest to any given general ledger account. Further, there has been no formal process in place to provide assurance that account balances are properly stated.

During this past year, Financial Accounting chartered the General Ledger Account Responsibility Project (GLARP), and formed a two-person team, Jon Vanvick and Bin Chen. At the initial stage, the goal was either to identify the persons responsible for each account and/or to purge those accounts which are no longer needed. This stage of our work is complete. The team has identified the persons responsible for 691 accounts, spread over 15 different departments, both within and outside of Financial Management. They have purged the remaining 284 accounts.

The team looks forward to becoming further acquainted with the people actually providing the account oversight, and the work that they do to keep the accounts in balance. The GLARP Team, others in Financial Accounting, and others within FM will be available to help as necessary. For example, the Payroll Office has been turning out some exemplary reconciliation work in recent years. They have graciously volunteered to share their procedures with departments seeking to improve their own processes.

Going forward, the GLARP team will periodically review and update the database of persons responsible for GL accounts, with a priority on purging unneeded accounts. Over time, this will reduce the likelihood of errors.

The Mentor Always Rings Twice
2006-2007 Mentoring Program Launches

by Dick Simmons

Eleven new pairs of 2006-2007 mentors and mentees from Financial Management (FM) began their mentoring relationship by attending an all-day workshop on March 22, 2006 at the Ethnic Cultural Center. The purpose of the workshop was to maximize the potential benefits of FM's Mentoring Program and was titled "Building Mentoring Relationships: A Mentee\Mentor Workshop". The matches of mentees and mentors had been done through careful and deliberate consideration by the FM Diversity Team. The workshop was led by Ruth Johnston.

The workshop was highly interactive with the entire group participating in open discussions, as well as each mentor/mentee working together on individual exercises. Topics discussed in the session included the benefits of the program for both mentors and mentees, how to be successful in Financial Management, the benefits of working in Financial Management, and the qualities of a successful mentor.

The individual mentoring pairs worked together to connect the mentees' plans and goals with an Employee Development Plan (EDP). The session focused on the functions of mentors and the skills needed by them, the role of the supervisor, and the role of the FM Diversity Team as relationship managers.

Ruth had prepared in advance Myers Briggs Personality Types for each group of mentors and mentees. These indicators help to better understand the differences and commonalities between individuals, and would help to facilitate communication and understanding between each mentor and mentee.

The FM Diversity Team thanks Ruth Johnston for conducting the training and the FM Executive Improvement Team for their continued sponsorship and support. The Mentoring Program has been very successful because it provides an opportunity for FM mentees to improve and develop their skills with support and inspiration from FM mentors.

The ODIN in the Tank
ICON Takes the Throne

by Heidi Anderson

After three years of blood, sweat and tears, on Monday, April 24, 2006, Student Fiscal Services went live with a new imaging system.

The new system replaces ODIN (Open Document Image Network) that was on the very last of its nine lives and Computing and Communications could no longer dedicate resources to fix all of ODIN's ailments. While ODIN was revolutionary at its inception in 1995, it had become extremely slow and cumbersome to use.

ODIN was developed to take student documents (prom notes, deferments, signature verifications, etc) and image them on the network for retrieval. This allowed SFS to dispose of paper files it kept on each and every student loan borrower. ODIN contained about 500,000 documents that also had to be converted to the new system. ODIN also contained thousands and thousands of corrupted documents that had to be cleaned up prior to conversion. The need for a new system was clear!

Launched in three separate phases, the shared system started with Accounts Payable. They created their system from scratch. Their system is more automated as they handle thousands of documents daily. Phase two was to create a test system that SFS could play with and explore. This test period lasted about a week and we were able to visualize how our system would work together with AP. Finally, phase 3 included the Student Fiscal Services ODIN conversion and implementation. The shared system is capable of handling hundreds of thousands of documents together and keeps costs low as we also share a server and some user licenses.

Several people worked on this project including Michael Lanham, Pam Luther, and Jeff Petersen from SFS and Bill Swann, Lisa Jones, and Alexis Raphel from C&C.

Aptly named ICON (Image Collection & Organization Network) after a naming contest which included such submissions such as THOR (to replace ODIN) and
Jaeson Albritton of the accounting unit at Student Fiscal Services won the naming contest for his submission of ICON, and a $10.00 University Bookstore gift card.

We are proud of our new system in SFS. Come on by and we'd be happy to demonstrate! We are excited for the possibilities that this new system brings to all of Financial Management.

QI – The Manager
A Newcomers Perspective
by Jeanne Semura

When I first arrived on campus eight weeks ago, I felt very fortunate to be joining such an enlightened organization. Here was a place that embraced and understood the value and true meaning of continuous quality improvement. Nowhere else in my quality management experience had there been an action-based commitment to building knowledge workers; workers equipping themselves to compete in the global labor market in the way work is done.

As the weeks flew by, I found myself immersed in several new initiatives, including: the Accounts Payable Customer Service Improvement Project, the Global Support Project, more recently the Non-Resident Alien Project Team, and the Balanced Scorecard (BSC) – Refresh Project. I'm serving as facilitator for these projects, with additional responsibility for staffing the BSC Project.

I've also joined several on-going quality improvement (QI) teams: The Dashboard Team, Inciters Team, Executive Improvement Team, and New Directions Team. It's been fun working with such hard working teams, committed to making things work better for their colleagues, customers, and ultimately the faculty, researchers, and students at the University of Washington.

When the QI movement emerged in the health care sector in the early 1990s, I was among a fortunate handful of people selected to receive training on QI methods and tools at the Institute for Health Care Improvement in Boston. The lead instructor was Dr. Donald Berwick, recognized today as the most influential physician in quality improvement in the county. As a senior analyst, I worked to integrate quality knowledge, practice, and culture for the largest managed care organization in the state. The work included QI training, facilitating multi-disciplinary improvement teams, measuring and analyzing process performance and documenting improvements to meet national quality accreditation standards. Since then, I've served as a project and process manager in utilization management, manager of quality program staff at the largest health care insurer in the state, a director of health care services for the largest Medicaid managed care organization in the state, and most recently, manager for managed care quality for the state's Medicaid program.

My connection to higher education stems from years of learning and research, as a UW doctoral student in higher education administration. My focus was on decision-making in complex, changing organizations and the effects on managerial jobs.

As a true believer in continuous personal improvement, I've continued to pursue learning opportunities not only in quality tools and methods, but also in better understanding how individuals and complex organizations learn, create new ideas, measure performance and diffuse innovations. I am eager to learn how I can best assist you in reaching your strategic goals and direction.

Cartoons-Themed Traveling Treats Anything but “Sketchy”
By Kyra Worrell

This years Traveling Treats event was on May 16th and the theme this year was Cartoons! It was an opportunity for all of us to get out and meet colleagues from other departments within Financial Management, put the faces to the voices we may have talked to on the phone, and generally have fun! There were 8 different areas to visit, with some departments banding together to get the maximum amount of fun and games!

Here is a list of the departments and their chosen cartoons:

Financial Accounting/EIO	Muppets
GCA	Hanna Barbara
MAA/QI/DSC/Controller’s Office	Dilbert
Payables, Travel, & Fin Services	Looney Tunes
Payroll	Mickey Mouse
Risk Management	Scooby Doo
Student Fiscal Services	Alice in Wonderland
Treasury Office	Investibles

The different departments all required that you work for your treats, whether it was playing trivia games or, in the case of Treasury, pairing up the mystery “Investible” Superhero with the corresponding staff member. Sometimes you could get by with your knowledge of cartoon trivia, other times it was necessary to know something about the office you were visiting! Many of us spent the afternoon journeying though many different lands of cartoons (there was something for everyone), learning (and eating!) along the way!

Law and “Order”
Helping Visiting Afghan Scholars with Money Management

by Diane Cooley

What connection does the Student Fiscal Services Outreach Unit have to a group of Afghan Law Professors?

The University of Washington School of Law has long been considered one of the leading institutions for Asian law. As a result of this expertise, the school’s Asian Law Center is the recipient of a U.S. Department of State grant for $2 million to establish a graduate program for Afghan law professors. The grant is funding a three-year project in collaboration with Kabul University Law School (KULS) to help rebuild Afghanistan’s legal profession. Afghan lawyers will spend one year in Seattle as visiting scholars or Masters of Law candidates to learn about the U.S. legal system. The project began last year in Afghanistan with seminars and conferences. English language training was provided to program candidates from KULS’s law and politics and Sharia, or Islamic law, departments.

The Afghan Law Professors have arrived in Seattle to begin their studies and this is when the SFS Outreach became involved. Banking in Afghanistan is very limited. As a result, very few of the KULS Professors have had any experience with a bank account. Writing a check or making a deposit was something they had never done. There are only 5 ATMs in Kabul so the intricacies of using an ATM were unknown. While here, each participant will receive a stipend for which the Professors opened accounts at Bank of America. The Professors are also supporting their families back home, so part of the money they receive is sent to Afghanistan.

The UW Law School contacted the SFS Outreach Unit for help with training. Normally the Outreach Unit provides sessions to UW students on managing their finances but we gladly took on the challenge of teaching the basic of banking. We have done 2 sessions. All the visiting Professors were very engaged and we had lively discussions.

I found it to be a very rewarding experience. It put a human face on an area of the world that is currently associated with some rather negative images.

To learn more about the program go to the UW Law School online newsletter at:
http://www.law.washington.edu/news/ebriefs/sp06/afghangrant.html
Or the Asian Law Center at:
http://www2.law.washington.edu/asianlaw/

EMPLOYMENT PRACTICES LIABILITY AT UW:
Continuous Learning and Improvement Reduces Risk

by Shari Spung

The Office of Risk Management plays a key role in managing the University's employment practices liability (EPL) risk. It does so through the process of continually looking for ways to communicate lessons learned to avoid future EPL complaints, claims, and lawsuits.

EPL Complaint Resolution Options

When an individual raises concerns that a University employee has engaged in discrimination, harassment or retaliation, the University offers three options for resolution. The first option recognizes that some concerns can often be dealt with effectively and efficiently at the local level by a supervisor or manager or with the assistance of Human Resources. The individual can also take their concerns to the University's Ombudsman or to UCIRO, the University Complaint Investigation and Resolution Office, part of Risk Management, for investigation and resolution.

UCIRO: Decreases Claims and Lawsuits and Increases Learning

UCIRO assigns an Investigation and Resolution Specialist who will objectively investigate the complaint to determine pertinent facts. Where possible and appropriate, UCIRO works with the department and the individual to resolve the issue. Regardless of the outcome of the investigation, both the individual raising the concern and the department have the satisfaction of knowing that a thorough investigation was done. Sometimes there was no policy violation but there may have been other actions which may have been inappropriate, misunderstood, or better avoided. In any case, the department has the benefit of learning from the investigation so that changes and learning can be put in place to avoid a future complaint.

Since its inception in 1994, UCIRO has had the effect of reducing claims and lawsuits against the University by seventy percent! We have learned that many employees who have made these complaints are satisfied with active listening, objective fact-finding, and appropriate handling and closure of the complaint.

Claims and Lawsuits: More Opportunities to Increase Learning and Avoid Risk

Sometimes complaints of illegal employment practices go beyond or even bypass the opportunities for resolution mentioned above and result in claims or lawsuits against the University. The Office of Risk Management investigates and manages these cases through its Claims Services Program. After the case is closed, the Claims Services staff conducts a "Lessons Learned" session with the key players involved to review what went well, what could have been better, where the department may be vulnerable to future claims, and remedial actions that should be taken.

The University's Reinsurer: Education and Avoidance Tools

The Office of Risk Management self-funds EPL risk up to a certain threshold, and purchases reinsurance to cover any risk above that threshold. Our re-insurer specializes in insuring Universities and Colleges nationwide. They offer us significant resources, including risk avoidance publications, educational teleconferences, legal bulletins, seminars and workshops, and claim consulting. Materials from their website are shared with other key departments at the University involved in managing EPL risk, including Human Resources, the Attorney General's Office, and those departments which have generated a higher volume of EPL complaints and claims.

PBI's EPL Subcommittee: Lessons, Data, and Getting the Word Out

Portage Bay Insurance (PBI), the University's captive insurance company, has an EPL Subcommittee which reports to its Board of Directors. It consists of representatives from Risk Management, UCIRO, HR, the Attorney General's Office, School of Medicine, Arts and Sciences, and Facilities Services. The Subcommittee meets five times a year and focuses on ways to reduce EPL risk at the University. The Subcommittee reviews annually the latest data on complaints, claims, and lawsuits and targets risk reduction efforts in those departments which show significant activity. The Subcommittee also sponsors an outside audit of employment procedures, practices, and policy every few years, and spends much of its time implementing recommendations from the audit to further improve our EPL risk.

Risk Management's EPL "Road Show"!

The Office of Risk Management recently developed a short training presentation for departments on how to avoid EPL risks. The training is available upon request and will be targeted at those departments which generate EPL complaints and lawsuits. Already, several departments have requested the training as a way to avoid a complaint or claim in the future.

The Office of Risk Management and the University have continued to evolve in the management of EPL risk. There will always be more lessons to be learned, more communication to be done, and more legal changes to which to adjust. Through continuous learning, we expect to continue to keep complaint, claims and lawsuits minimized.

They Serve Customers, Don't They?
The amazing CST Team
by Anita Bingaman

Do you ever have days when customer service does not come easy? Your desk is piled high with stacks of papers in various stages of completion. Your email list is growing exponentially and the phone will not stop ringing. The last customer yelled in your ear and you do not want to be nice to anyone at the moment, so hopefully the phone will not ring or none of your work mates will ask you for something. Well , you are not alone, Bunky!

Fortunately, if you work in the Payroll Office help is just around the corner. The Payroll Customer Service Team, aka CST, comprised of Farida Ablang, Margarita Mortel, and Eva Lu, helps make customer service easy in any situation. The team provides training and other activities for the Payroll staff. Their support is ongoing, beginning with new employee orientation and continuing through the everyday affairs of Payroll processing.

CST has found many ways to keep the idea of excellent customer service in the forefront of the minds of the staff. At each monthly Payroll staff meeting the team reports on their latest activities, asks for examples of good customer service, and sometimes gives a presentation on customer service qualities. The team also maintains the "CST Corner", a wall space where such things as service qualities, do's and don'ts, and/or helpful tips are posted. They sponsor a Comment/Question box for external customers. Questions from the box are answered and then used as Frequently Asked Questions posted on a FAQ Board in the Payroll lobby. Compliments to Payroll staff found in the box are passed along to the deserving Payroll staff member. (See this issue's Kudos)

In promoting good customer service, CST is a good role model. For example, the team conducted a survey to determine how they could be more helpful to the office staff. In response to feedback on the survey, CST arranged for Ruth Johnston to provide a refresher course on the Meyers-Briggs Type Indicator. There are also plans for a Payroll interoffice newsletter and a summer event with the Benefits Office, who resides in the same building and is Payroll's process partner.

So, on those bad days it is helpful to know that there is a team working in the background willing to support you and that you have the right tools to struggle through those occasional rough spots.

The Big Sweat - Fear of Public Speaking

by Norm Englund

It was a fairly large class that afternoon. But even so, the instructor began by asking each person to stand up and give their name, the department they worked in and tell a little bit about themselves'. Just my luck, as I was at the back of the class to the right, I had to wait out the introductions of about thirty people. With each introduction, as it got closer to me, my nerves increased and I start perspiring. What would I say? What would they all think of me? Finally, after what seemed like an eternity it was my turn. In a very nervous voice I began, "My name is Norm Englund and I …

Sound familiar? In polls taken through the years, public speaking is always among the greatest of fears among people; even greater than flying or dying. Like many people I shared this fear and inwardly wished that I could overcome it. I wished that I could stand up in front of a gathering of people and confidently and comfortably present a message; one that my audience would find witty and valuable, leaving many of them thinking, "Wow, I wish I could do that." Well the good news is that you can! Toastmasters is an international club that was created to help people all over the world to overcome their fear of public speaking.

In January of 2004, as I was finding myself in public speaking situations more and more in my job, and obviously uncomfortable with it, I was encouraged to look into a Toastmasters group that met every Tuesday from 12:00pm till 1:00pm in Schmitz Hall. Before committing to, and subjecting myself to such an uncomfortable environment on a weekly basis, I decided first attend a few meetings as a guest, to see if I really wanted to do this. What I found in just three meetings was remarkable. First, I was in an environment with about twenty people who shared the same fear as I did. But in a very casual, non threatening way, they were all helping each other overcome their public speaking fears. Every person in the room was a participant in some speaking role, with those having the least experience having very small roles and those with greater experience with more significant roles. There was a lot of laughter, some very personal and interesting speeches, some fun speaking games and a great deal of positive, yet constructive input to and from all participants. But what really amazed me was to see first hand the individual development of several people within the group within just three weeks. I could see them gaining confidence, making eye contact with people, using hand gestures and body language to emphasis points, learning how to project, organizing speeches better, using visual aids and learning how to think on their feet better.

After three weeks, I became a member of the group, and after a few months and several speeches behind me, I found myself in front of groups of people delivering my messages with humor and confidence, without getting nervous and sweaty: pretty much everything I had sought to come away with from Toastmasters. But the part that really makes me a believer is that not only did I recognize my own growth in this area, but that many other people apart from Toastmasters have commented on how much I have grown in the last several months as a public speaker.

If you are among the many who have the dreaded fear of getting up in front of people and talking, this is an organization that I highly recommend. If you are interested in seeing how a Toastmasters meeting goes, but are unsure about making such a commitment, I would encourage you to attend an upcoming meeting as a guest. For details you may call either Diane Cooley at 543-8682 or Kyra Worrell at 616-0305.

Toastmasters hosted a Brown Bag Lunch Showcase at the Ethnic Culture Center in June. The Showcase was set up as if it were a regular meeting to give spectators an idea of how regular meetings are conducted. We saw many of you there, and we hope to see many more of you at the weekly FM Toastmasters meetings starting Tuesday, September 12th.

The Knowledge-ease Falcon
Knowledge Workers at work in FM

By Al Hammett

It was raining outside. Nothing new, it always rained in this berg. Spam Paid looked out his dingy first avenue office window overlooking the alley. For an extra sawbuck a week he could have gotten an office overlooking the bay. "Hah! An extra sawbuck! To have that kind of dough you'd have to be a knowledge worker now days… or give up the booze – fat chance of that!" Spam blurted out as he tore aside the shade. Business was bad, really bad, especially after the untimely death of his partner.

Watching the rats down below his window trying to find their next meal, he kept mulling over in his mind the last words of his partner, "What's this knowledge worker thing anyway?" Without turning around he banged his fist on the old radio nearly knocking the tubes out of their sockets. He heard the announcer say…

"Have you ever wondered what it means to be a knowledge worker or how the Knowledge Worker Initiative began in Financial Management? Here are some good quotes that we came across to help define knowledge worker:

'Adds value by processing existing information to create new information which can be used to define problems." Peter Drucker

'Knowledge Workers are continually learning, aware that knowledge has a limited shelf life." Rogoski

'A problem solver versus a production worker." Allee

"The Knowledge Worker Initiative was born as a result of the Strategic Plan in 2002. In 2004, the Executive Improvement Team (EIT) formed a sub group to combine the work of several groups including Student Fiscal Services, Risk Management, FM-wide focus groups and the EIT. Later that year, the EIT identified 15 skills that were considered knowledge worker skills. Twelve were identified as top skills which needed further definition.

"The Inciters team worked to further define these12 skills and came up with a matrix identifying three levels for each skill; basic, intermediate and advanced. In 2005, the Inciters team presented the skills matrix to the EIT which resulted in a reduction to eight skill categories. They presented the skill categories, along with the Strategy Map, to FM leaders; this demonstrated where the Knowledge Worker Initiative fit in with the goals of Financial Management. Three departments volunteered to roll out the Knowledge Worker Initiative. The three pilot departments are Payroll, Financial Services and Student Fiscal Service. More to follow but first a word from our sponsor…"

That's it. This was the ticket. My ship had arrived; I just needed to meet it at the dock. I would head down to the U and investigate this some more.

When I arrived at the U, I discovered there were three pilot programs going on. The first was with a group known as the Student Fiscal Services; SFS for short. I asked Li Chang Wong, a Program Manager there, if she could fill me in:

"Well, Spam, in the summer of 2005, Student Fiscal Services agreed to be one of the pilot groups in Financial Management for the Knowledge Worker initiative.

- SFS leaders had a retreat to develop a plan.
- Several staff meetings were held in autumn 2005 to discuss the skills.
- Employee groups talked about the expectations and skills for their jobs.
- Unit leaders met with their staff members to discuss and finalize the skills.

"We are now in the final stage of rolling out the KW skills for all staff members. We will then use the framework for setting performance goals, providing training, in hiring new staff, and in unit and All-staff discussions about the future.

All right, we were starting to get somewhere. This stuff is so new that they are still trying to figure it out themselves. This is getting in on the ground floor. Then Li Chang introduced me to Keli Johnson who gave me the scoop on Financial Services:

"Financial Services began their knowledge worker roll out with:
- Leaders retreat to review the Inciters template presented to the EIT.
- Leaders retreats to discuss each skill and how it fit within FS.
- All Staff Retreat. This took place in February 2006.
  - o Received feedback about the identified KW skills.
  - o Retreat was facilitated by Ruth Johnston.
  - o Staff helped decide where their job fit into the KW model in terms of basic, intermediate and advanced skill levels.

"A few weeks after the retreat, the leaders got back together to finalize what we felt would be a great template for our knowledge worker initiative for FS. Going forward, we will be using this model to help redefine our job descriptions and as a tool for helping to decide what classes/trainings or other education is needed for our EDP's

This was getting better, but what's the payoff? I mean what good is this going to do me if it doesn't pay the bills? Payroll was the next item on my dance card. Christa Woodhull, a Program Operations Specialist in Payroll filled me in:

"The Payroll Office began with a different approach than Student Fiscal Services and Financial Services.
- Kept the original eight skills categories and added Technical Skills.
- Kept the Dialogue Sheet (basic, intermediate, advanced), as a basis for Employee Development and discussion.
- Reviewed job classes/descriptions for updates using the KW process.

"We began by rolling it out directly to the staff at an all-staff meeting.
- Each person using the dialogue sheet would do a self assessment.
- Supervisors would assess them now and project for the next five years.
- Each person then revised their current job class/description accordingly.

"We took this approach to ensure that future employees in the office understand from the beginning the importance of the KW Premise to Payroll and Financial Management.

"As we move forward, Payroll plans to develop a measurement to track the work we are doing regarding the program. We will also incorporate EDP plans to develop those skills identified during our gap analysis, and those skills need to meet Payroll's five year strategic plan.

Ok, I'm sold. Who do I see in order to get in on this caper? The answer? The Inciters Team. Where did that arrow that killed my partner come from? We'll never know. Here is a list of the ringleaders present and past:

Keli Johnson (co-leader) Financial Services, Christa Woodhull (co-leader) Payroll Office
Katrina Day, Risk Management
Miriam Garvey, Student Fiscal Services
Kirsten DeFries, Grant and Contract Accounting
Kelley Smith, Financial Accounting
Dinah Walters, Decision Support Center
Jeanne Semura, Quality Improvement Program

Erin Courtney, Financial Accounting (Outgoing)
Kristin Findley, Grant & Contract Accounting (Outgoing)
Rae Ann Laubenstein, Financial Management (Outgoing)
Li Chang Wong, Student Fiscal Services (Outgoing)

The Savvy Travel Office
By Kevin Wald

UW travelers are becoming increasingly savvy when it comes to making their arrangements. So it is more important than ever for the Travel Office to demonstrate their expertise and knowledge by sharing advice and recommendations about how to ensure customer needs can be met while still complying with state regulations.

Recently, Directions spoke to Teresa Crisostomo to see how they are getting on....

"The last year was extremely challenging to the Travel Office" says Travel Office Supervisor Teresa Crisostomo. "Airline bankruptcies, constantly-changing airfares, and the lingering aftereffects of 9/11 were just some of the issues that combined to test the resolve of each of us. And if that were not enough, the Business Travel industry itself is undergoing a technological revolution. How business people travel, how they book their travel, even how they think about travel is fundamentally changing."
In addition to these outside issues, Teresa was quick to add that "Last year was also a year of solid growth in so many areas. For example, we saw in increase in the number of expense claims being submitted rise to nearly 5500 a month (a 25% increase from the year before). But despite this increase, we maintained our goal of processing all TEV's within 72 hours. A few years back, only 58% of expense claims were being cleared within 5 days. Now, that figure is more like 97%. And the response from our customers has been fantastic. They are delighted with our service."

When asked how the Travel Office was able to achieve this, Teresa said she believes the answer lies with the professionalism and commitment to effective teamwork each staff member exhibited.

"It was amazing how staff all came together and made their contribution – everyone carried out the work with such dedication. I believe it's a sign of a happy family. Everyone tried so hard to solve these problems. They are proud of their work and wanted to make sure they met all the challenges head on."

Teresa also emphasized that the hard work wasn't just limited to dealing with the larger issue facing the Travel Office.

"Of course, we were also busy with other issues – we had to deal with a broad variety of questions and problems from all sections of the UW campuses, keeping the Travel website current, and we invested a great deal of time and effort in training, both through the formal Travel Class and visiting departments to offer specific guidance. Meeting these challenges was hard work, but we got there!"

Teresa was also quick to say the Travel Office can't rest on its laurels.

"We still have so much to do. We are struggling to find an effective means to disseminate information to everyone on campus in a timely manner and we are also eager to hear more from our customers –what they want and need from us," she mentioned.

Nevertheless, Teresa sees this as an exciting time.

"The success of the Travel Office is a good news story that heralds more positive changes to come in the future," she enthused. "This is what Financial Management is all about. We have the opportunity and resources to effect real change and improvement. No longer is it just more of the same way of doing things. That's how the Travel Office is continually improving!"

The Summer Event
By Diane Cooley

Summer 2006 gave us lots of sunshine and warm days. By September the rivers didn't have much water flowing in them and we were ready for rain to replenish our stores of water – after all, what would Seattle be without lots of moisture. The week of September 18 began with clouds and impending rain. Unfortunately this was the week of the Annual Financial Management Summer Event scheduled for Wednesday. A time for all of us to celebrate together, to share our accomplishments, to visit with people from other departments in Financial Management, and maybe make some new friends.

The day dawned with clouds and rain, of course. A hot summer may have helped us forgot what rain was like; but, living in Seattle, you don't let a few drops stop you from having fun. Departments had worked hard to prepare displays designed to illustrate some of their accomplishments. We knew that the RQT and EIT would be there to share our successes. And there would be food. (After all, there's always food at a Financial Management event!) We donned our raincoats and made our way to the Physics/Astronomy courtyard to enjoy ourselves.

We crowded together under the covered area. We threw our names in the hat for door prizes. We picked up the quiz sheet and headed for the displays to find the answers. We snacked on cookies and nuts and other fun items. Yes, even the ice cream tasted good on a not-so-sunny day. We warmed up with coffee and tea. We talked to lots of people and generally had a good time. The only part missing was the music. (Unfortunately it was too wet for Norm and his band to play.)

This is an annual event and a great way to celebrate the previous year. Thanks to all the people who participated – either as a planner, worker, display designer, or guest. Great job and lots of fun, even in the damp weather.

I Wake Up Chatting

Kyra Worrell

IM-ing. Instant messaging. Chatting online. It's become a big part of our culture. For students who were banging on keyboards as soon as they were able to pull themselves up to a standing position, it is as natural as breathing. It's a step beyond email – it's talking – well, typing -- on the Internet, in real time, with another person. You type something on your computer -- and then someone – even someone halfway or all they way across the world – sees what you are typing and can answer on their computer. It's a miracle of modern technology that has become commonplace for millions of Internet-savvy people. For Universities and other institutions of higher learning, it's the logical next step for communication technology. It's something our Internet savvy students almost expect. Therefore, it's natural that Student Fiscal Services (SFS), as a national in providing the most up to date electronic services, would want to tap into this phenomenon for the benefit of our students and our staff.

It is a fact that SFS staff are inundated with phone calls and emails, especially during our busy times. We know that our students are busy people, often juggling school, work, family, life – they don't have time to wait in a long queue to get a simple answer to a simple question. In the spirit of quality customer service and technological innovation, we started looking into the "Live Chat" option. After an initial two week trial period that went really well, SFS made the decision to sign up with the Live Chat system in January 2006. We initially contracted to have 10 advisors registered to answer questions in the live chat format and now all staff have Live Chat accounts.

Students, parents, departments and any other customers can access Live Chat though the link on a number of SFS tuition-related web pages. It is a free service. One click on the link leads the customer to a login screen. He or she then types in contact information and a question. SFS staff will hear a cheery ring on their computers and are able to see the customer's name and question. Any number of staff can be on Live Chat at the same time – and all have a chance to assess the question and see whether or not they are the best person to answer it. There are also features in the service that allow the advisor to call or invite other advisors into their chat room, if a question comes up which requires another's expertise.

The use of Live Chat has been steadily growing since it was first introduced. Everyone who used it loved it! SFS knew it was time to begin an official "roll out" of the Live Chat service in summer quarter 2006. There is a Live Chat headline on the student's MyUW homepages. Emails have been sent out to people who worked closely with students, namely undergraduate and graduate academic advisers. The SFS Outreach unit added the information to all their new student orientations, reaching all incoming freshmen and many incoming graduate students. The response has been tremendous and uniformly positive!

Instant messaging is quick, easy and something most students are familiar with. It's a great way for customers to contact SFS – they don't have to wait on hold on the phone or wait up to 24 hours for an email response! Every single person I've talked to via Live Chat – and I've talked to a lot – has thanked me for the service. Others are more expressive: it's "way cool" or "too cool"! One thing is for sure – it's the way of the future!

Kudos

Compiled by Kyra Worrell and Neal Burton

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

I just want to thank you for Ann Anderson's participation in emergency planning. There has been much progress since Ann has been involved.

To: Ann Anderson
From: Mary Fran Joseph

I find the Financial Mgmt Newsletter to be a great mode of communication. It provides information succinctly and directs us to appropriate WEB sites if we want to read all of the information. I send this out to our Medical School Administrators and Dean's Office staff. I have often referenced your newsletter when citing examples of good communication tools. Thank you for putting the time and effort into keeping us updated.

To: Ann Sarna, Treasury
From: V'Ella Warren

How nice to see this gift coming our way! And, it is great to see you playing a direct role in fund-raising. Good job!

To: Ann Sarna
From: Kerri Everly, Program Manager, UW Combined Fund Drive

Congratulations! You have been awarded Outstanding CFD Coordinator by the King County CFD Steering Committee. Thank you for your excellent work on the 2005 UW CFD campaign.

To: Chris Malins, Treasury
From: Leann Dawson

Thanks - honestly you have the best customer service and this is great timing for a presentation Paul is making at the FC next week.

To: Chris Malins, Treasury
From: Weldon Ihrig

Way to go in continuing to provide quality client services. Your efforts are appreciated.

To: Cindy Gregovich, Payroll
From: Ann Anderson Asst Vice President and Controller

Nice job and recognition, particularly from Mike!

To: Cindy Gregovich, Payroll
From: Peter Kelley, Assistant Editor University Week

This note is to express my thanks to Payroll for very, very quick work today. I changed my direct deposit account recently, which caused me to have a paper check on Friday. But it didn't arrive, and I was off that day. I just noticed this morning that I had no check. Our payroll coordinator called it in, and lo and behold, by 1 p.m. there was a replacement check waiting for me at Payroll. And for this I say THANK YOU!! Nicely done!

To: David Wright, Financial Services
From: Laurie Hunt, Client Support & Technology Manager University Stores

Mike (Byrant) has agreed to give eProcurement a try. I will be calling …on Monday to set up a meeting so that Stan and I can demonstrate the new features of eProcurement and set up the timeline for going live. David, I would like to thank you for working with us on this issue. Building a partnership between our two teams is essential to serving the campus and this is a great example.

To: Douglas Breckel, Chris Malins (Treasury)
From: Harlan Patterson, Mark Emmert

Harlan Patterson: All, note the president's comment below - which I share - you are all doing a great job.

Mark Emmert: By the way, you and your team did a terrific job on this - so far, so good.

To: Doug Breckel, Chris Malins
From: Weldon Ihrig, Phyllis Wise Provost and Vice President for Academic Affairs,

Weldon: I wanted you all to hear the positive comments from Mark and Phyllis as well as add my thanks for your and your colleague's great work so far on Safeco.

Phyllis: Ditto on Mark's compliment (See comment from Mark Emmert above), It was wonderful to listen to the conversation yesterday. Regents questions were sophisticated and important and you had all the answers. What a team! You were all great. Hope that you will pass the word to all you folks who were present and who worked behind the scenes that I was awed and learned a lot. We really do need to get this building. I am sure you have positioned us optimally.

To: Erin Courtney (Financial Accounting/Equipment Inventory)
From: Zenaida Shattuck, Audit Manager, Internal Audit Department

I think congratulations are in order. I told Erin this is the shortest visit I can remember. From Ann Anderson, re: kudo: WOW!!! This is really something! I understand C.C. was very pleased with the advance reports you prepared for her and it obviously contributed to the short stay today. Good work and my thanks!

To: Financial Desktop team
From: Dave Asher, Director of Finance and Planning, Educational Outreach

Thank you, Financial Desktop Team! To all those that have contributed to the development and improvement of Financial Desktop, you have done your service to this corner of humanity extraordinarily well! You have provided the foundation for fiscal services interface that will serve us for decades to come. Thank you. Thank you. Thank you!

To: GCA Team 1 (Mena Nguyen, Dee Anne Neal, Zia Uddin, Jay Chen, Amy Liu)
From: Donald Kunz, Budget Analyst, Division of Oncology

Mena, thank you ever so much!! I am so fortunate to work with such a great team!! I really enjoy working with you and Dee, Zia, Jay, and Amy. As an example, recently Zia and Dee dropped everything to help me on two separate matters and it was really appreciated.

To: GCA Team 5 (Monique Bradley, Kiet Tran, Alice Bukengolts, Sophy Xu)
From: Beverly Anderson, Administrator, UW College of Forest Resources

Thank you so much! I appreciate your tremendous responsiveness. It’s great to be on your team.

To: Teresa Vu, Juinette Schrijn, Christa Woodhull, Sadiq Lew (Payroll)
From: Mark Ondrake ,Budget/Fiscal Analyst, Otolaryngology

Ms. Vu and Ms. Schrijn did a fine job on my recent, urgent Opus question. You have a superb team, and they really help us when needed. In addition, even though Sadiq and Christa are gone today, they gave very thorough extended absence phone greetings to direct me to their back-ups. In summary keep up the good work, enjoy the weekend, no reply needed.

To: V’Ella Warren
From: Weldon Ihrig (in response to the above Kudo)

That is a great focus on the need for consistency in customer service--the little things that make people feel good and the message is a great way to do that.

To: Heather Norberg Stewart (Payroll)
From: Chuck Reinsch , Computing & Communications, Business & Finance

Thank you very much! This will help us a lot.

To: Jeff Follman
From: William Ferris, Executive Director of Administration, Office of the Executive Vice President

Congratulations! That’s impressive. Good for you and Good for the University of Washington! (regarding Jeff Follman being asked to join the project group of the NACUBO Accounting Principles Council (APC) that is working on the Financial Reporting Inconsistencies project.)

To: Jeff Follman
From: Lee Huntsman
Re: LSDF admin services agreement

Thank you! Alden will come prepared to give you snapshot of where we are in building our organization and how we expect it to unfold.

To: Joanne Matson (Treasury)
From: William Ferris, Executive Director of Administration, Office of the Executive Vice President

Thank you so much for “loaning” us the assistance of Joanne Matson last Friday. She was great! As you know both Nancy & Lionel were out of the office at the same time, and it was important we had a reliable presence in the office to cover certain critical calls and ensure appropriate forwarding to Weldon. Her sense of professionalism and experience in dealing with high profile callers (like Jeff Brotman) instilled us all with a great deal of confidence. I'm not sure if we're going to let Nancy take any more time off, but if we do, we may call upon your/her generosity once again. (sent to V'Ella Warren)

To: Karen Long, Alison M. Stevens
From: Ann Anderson

You may have heard (and it may not be for public consumption) but they WON the Distinguished Staff Award!!! I'm not certain it's public knowledge yet, but I wanted you to know and wanted to thank you so much for your letters of supporting the nomination. Ali and Karen are simply tickled pink and every other color of the rainbow!!

This is just wonderful recognition of the program and more specifically, for Karen and Ali!!! Thanks again! I'm so excited I can hardly stand it!!!

To: Karen Long
From: Bill Gates Sr.
Miss Long,

I am told by Carol Fyall at Costco that you got together the data on purchases from Costco during 2005 for our Public Disclosure filing. This is very helpful and I am sure Dan and Jeff Brotman appreciate it as much as I do. Many thanks.

To: Karen Long , Carla Helm, Lynn Beck, ,Mike Purdy, Michael Verchot
From: Sandra Lier, Associate Vice President, Business Services Division

Thank you, Kudos on your good work on starting up the Business Diversity Program! It will serve as a vital link between the UW and the business community.

To: Kiet Tran (GCA)
From: Marivic Jimenez, Research Administrator University of Washington,College of Forest Resources; and Lisa Shipley
Marivic: Thank you all!
Lisa: Thank you thank you!!! You have made my life so much easier.

To: Keith Ferguson (Treasury) and Treasury Office
From: Jeff Brotman, Board of Regents and Costco

Congratulations to all who participated in this fine result. We ask only for a repeat!

To: Kristin Findley, GCA
From: Amy Gonzalez, Huron consultant

Just a few small words to say that Kristin did an excellent job in helping us manage our workload at UW. She was always patient and willing to assist us with a smile on her face. Her door was always open despite the challenges that we encountered at times. She should be definitely commended in her role!

To: Kyra Worrell, Heidi Anderson, SFS
From: Weldon Ihrig

Congratulations to you and Heidi upon receiving Pangaea Awards. It is great that you are winning this year, but more importantly you both have set examples for your colleagues to emulate in the future. (Kyra), I hope that you find your experience in Kenya very rewarding.

To: Kyra Worrell, Diane Cooley, SFS
From: Jean Joichi , Undergraduate Academic Adviser, College of Architecture and Urban Planning, Dept. of Architecture

Last week went by with a whirlwind. I wanted to thank all of you for your participation in our student orientation. Much information was relayed! We appreciate your time and enthusiasm

To Kyra Worrell
From: First Year Programs

Thank you for supporting Spring Quarter transfer students at our banquet. We greatly appreciate your time and knowledge shared in order to welcome new students to UW!

To: Kyra Worrell
From: Peg Chen, Master Adviser's workshop

Thanks so much for coming to speak at the Master Advisers Workshop! The advisers appreciated learning more about SFS.

To: Lynn Duong, Heather Norberg Stewart (Payroll)
From: Michael R Bryant, C & C

Reiterating Chuck's thank you with my own expression of sincere appreciation for all of the assistance provided us by the two of you and your very prompt response to our needs. Your efforts have indeed helped us a great deal in transitioning our accounting structure to where we need it to be. Thank you!

To: Lynn Duong (Payroll)
From: Danelle Dauron, Finance & Administration, University of Washington, Tacoma

I just wanted to let you know how awesome I think you do in your job. At UWT we have so many various deductions taken for parking, flex pass, etc, but we never have any problems with you processing all the spreadsheets we send you. Thanks so much for your great work! It's great working with you!!

To: Pam Luther (SFS)
From: Nanci L. Murphy, Associate Dean, University of Washington School of Pharmacy

I sent the form with signatures back today. Thank you (as always) for your help! Please let me know if there is anything I can do for you- Although, we have never met in person, I know who to call when I have a particularly difficult question and have always appreciated your wise ounsel.

To: RAA
From: Bill Ferris, Executive Director of Administration, Office of the Executive Vice President
Re: FY 2006 Research Infrastructure Allocation .

Thanks for the kind words. But it's RAA that deserves all the credit - it's an amazing organization - asked to take on an enormous responsibility and workload, with very little resources. Plus, you've built up a good deal of trust & respect within the Budget Office, making my job a lot easier. Glad I could help in my way.

To: Ruth Johnston
From: Ann Anderson
Re: The POP process

This is a great example of incremental improvement...identifying an improvement, implementing it and looking forward to additional enhancements at the same time! This particular solution will provide additional efficiencies (NSF and related check processing) as well as the obvious reduction in fraud. Good work!!

To: Sandie Rosko (SFS)
From: Janie Martinelli, Sr Manager - Client Service

It's important to me to write you. I have the absolute utmost respect for you. Your intelligence, leadership skills, and successes have been a role model to me. I so much enjoyed our interaction when you placed your trust in GRC to allow us the opportunity to perform the University's collections. Yes, it was a rocky road in the beginning, but your patience & willingness to teach me your expectations were & are appreciated. I certainly hope you have heard these types of Compliments from others you have mentored over the years!! You impacted my life positively & I want to express that to you!! Take care, & have a terrific Easter!

To: Sandie Rosko, Heidi Anderson, Andrew Monusko, Frannie Gladney (SFS)
From: Victoria Corrin, ERS (as told by Ruth Johnston)

When I was at the NACUBO SFS conference I had the opportunity to talk with Victoria, our ERS vendor rep, after I presented my session on Developing Knowledge Workers to the 150 or so who attended. She was complimenting me on the session, but was even more wanting to validate her experiences with you all as knowledge workers. She went on to say the most of her clients take whatever she gives them without question, and that while that was fine, it was simply too easy. She is challenged by us! She loves how you probe, question and really go after concerns that might affect our students or our collections. She likes being held to a high standard; it helps her do a better job and makes her work more interesting. The other side of that is your willingness to research and dig deep. When she has a question for you, insead of saying you don't know or acting like it doesn't matter, she says you all eagerly take on the challenges and work them toward solution. She says we stand well above other clients she works with. I love hearing things like this! It makes me very proud of our collective efforts and yours in particular.

Great job! (Next Quote from Weldon Ihrig in response to this kudo): Wow, that is high praise which is well deserved for the entire team.

To: Scott Davies, Treasury
From: Jeff Brotman , Costco (via Keith Ferguson)

Today, Jeff Brotman said we did a superb job on the call with tight analysis. That is a nice compliment, which you deserve. I am glad the call went well.

To: Tami Sadusky (GCA)
From: Denise Rouleau, Chair, FRA Neighborhood Committee

On behalf of the FRA Neighborhood Committee, I would like to thank both of you for taking the time to be our experts for the ILS session on Wednesday. You both put in a lot of work and I think the session went over well with our members. I consider it to have been a success! Thanks so much!!

To: Team GCA 5 (Monique Bradley, Kiet Tran, Alice Bukengolts, Sophy Xu)
From: Steven Charvat (CEM), UW Emergency Management Director

Just a quick note to let you know how impressed my staff and I were of the exceptional customer service provided by members of your "Team 5". To us, they should be called "Team #1". Yesterday, the entire GCA Team 5 met with our Fiscal Specialist, Dede Garcia, myself and Michelle Lynch, Manager of Budget and Strategic Planning for the AVP of Business Services. While the original purpose of this sit-down meeting was just to help us figure out the intricacies of sponsor grant billings for a federal homeland security grant, Monique and her team went that "extra mile" to provide us with additional information, tips and suggestions on how to streamline the process for grant payments and reimbursements from our sponsor. As you know, the UW Office of Emergency Management is quite small (only 2.5 total FTE's), yet we are responsible for bringing in and managing a large number of grants in the millions of dollars. As a new department with very limited grant experience, the task at times seems daunting, especially in light of all the mandated and required paperwork and processing requirements working with so many sub-budgets! I was pleasantly surprised by the "can do" attitude shown by Monique and the rest of Team 5. As a Department Head, I can appreciate the level of detail required by your staff to make a complicated process of grant and contract accounting seem less onerous. Going into the meeting, I fully expected the experience to be dry and all about numbers, etc.... However, the Team 5 members personalized our experience with a refreshing sense of humor, provided us some excellent guidance and left us with the feeling that we can contact our new friends in GCA at any time with questions, guidance, etc... We even got a tour of their offices! Anyway, I know that you would like to know how impressed we were with your staff. Keep up the good work!

To: Teresa Crisostomo, Diane Harker (Travel)
From: Jennifer Adrien, Assistant Director, Global Business Center, Business School

Thank you both for the meeting this afternoon. I feel so much better about the "health" of the 2007 study tour finances now that I have a strategy for helping the students manage those funds, as well as a (hopefully) faster way to reimburse them for faculty-related expenses. I really appreciated your feedback & advice on how to navigate the Business School's financial pipelines, as well as get the answers I need. I've shared the info with my GBC colleagues and we'll certainly use your guidance in the hopes of increasing the turn-over time for check requests. They also told me that they're putting together a list of discussion points which they'll share with Tauyna after the current budget process has been completed. That falls right in line with your advice. Thanks again! It was a pleasure to meet both of you and to match people to the names.

To: The Treasury Operations Group (under Judy Peterson)
From: Weldon Ihrig

Great idea and glad that the team worked thru T&D. The long waiting list is indicative of the interest and need. (on developing a training program on the endowment.)

To: W2 Processing Staff (Payroll)
From: An anonymous customer (left in the Payroll Office suggestion box)

"Thank you so much for the rapid and understanding assistance to those of us who misplaced W2 forms."

RQT Roundup

Compiled by Chris W. Malins

The Recognition Quality Team (RQT) has been keeping quite busy since our last report in January. Through September 2006, Financial Management continued to recognize peers with 236 BRAVOs, 426 Recognition Treat Certificates, 6 Expresses, 5 TOPS Awards, 3 LINQ Awards, and 4 QSTEP Awards! In addition, the RQT also hosted two quarterly Person-to-Person Gatherings, and helped out with the Traveling Treats and Summer Events. Here are the details from January through September:

TOPS Awards

Shawna Litterski, Anita Bingaman, Anna Mirza and Lynn Duong were recognized with a TOPS for their work on the Payroll General Ledger Team. This TOPS award was presented on Friday, January 13, 2006.

The goal of the Payroll General Ledger Clean-up and Reconciliation process was to reconcile the existing Payroll office general ledgers, eliminate any possible errors, and set-up a standard reconciliation and approval process. When the project started, there were over 70 GLs, there are now 89 General Ledgers reconciled by the Payroll Office. The have also provided Financial Accounting with a current list of their GLs to help them update the master list. The Payroll General Ledger Clean-Up has been a long and arduous process. This team's attention to detail, passion for good accounting practices and solidarity through difficult debate should serve as an example for other teams.

On Thursday, March 23, 2006, Frannie Gladney from Student Fiscal Services received a TOPS award for her work with the Overaward Collection Process, a long-term process improvement resulting in improved customer service, opened channels of communication with process partners, and cost/time savings.

Frannie took a process that needed attention and gave it the attention it deserved. She gave it uniformity. She gave it guidelines. She applied good accounting techniques. Frannie also gave a year of her life to work as an intern in the Financial Aid office to learn the front end of the student loan process, which helped open channels of communication with that office. She builds relationships with the students and works with them through the overaward collection process - and is successful in getting them to pay their debts. There are more "paid in fulls" and fewer write-offs than ever before. And, very importantly, the UW stays in compliance with Federal and State overfunding procedures.

On May 23, the members of the of the Short Term Default Loan project: Heidi Anderson, Andrew Monusko and Frannie Gladney from Student Fiscal Services were recognized with a TOPS award for their work to help reduce the number of students defaulting their short-term loans.

This team analyzed the students who were defaulting, created an aversion program for seniors, designed and distributed brochures, created awareness and developed an adviser and FAQ website. This was not an easy project. The team embraced it and learned new skills in problem solving, exercising creativity, improving process partner relationships and data mining and analysis. They are demonstrating knowledge worker skills and contributing to the reputation SFS has for serving students in a caring and proactive way.

On October 2nd, 2006 Sarah Moore and Erin Courtney were awarded a TOPS award for their efforts to streamline the payroll load process. They took an overly complex spreadsheet that required lots on unnecessary inputting and simplified it to create a more efficient and understandable calculation. It also allowed for a more timely calculation, and a message that was easier to communicate to the departments. Finally, the revised worksheet now allows for early estimates so departments can use preliminary planning numbers for their own budgeting processes.

On October 11th, 2006, the IPT Team was recognized with a TOPS award for a rapid process improvement regarding logging and processing of invoices. The team was able to successfully implement a rapid process improvement to log all invoices within 48 hours of receiving and process all invoices within two weeks before the payment date. Since implementing the improvement, the team has been able to meet its goal 95% of the time. The members of the IPT Team are: Amella Bermudez, Jessica Crabb, Rion Phan, Rosemarie Valencia, Agnes Acholonu, Lolita Adario, Annette Johnson, Alvin Chau, Heather Nicholson, and Donna Andreason.

LINQ Awards:

On January 11, 2006 Teresa Crisostomo from the Travel Office received a LINQ award recognizing her for the qualities approachable, inspiring, trustworthy, and trusting of others.

Teresa is viewed as being approachable not only because her door is always open, but also because she shows a genuine interest in others and cares about people professionally and personally. She is flexible and sets a supportive climate where she encourages her staff to learn and grow. One comment made was "Teresa has taken our ideas, complaints and compliments to heart, setting aside her own feelings to better the situations for our team and relations with the outside customers."

Teresa is inspiring because she "walks the talk" and "leads by example." She instills confidence in her staff and encourages and supports their personal growth. She's always looking to improve processes and is willing to pitch in where it is needed.

Teresa displays the quality of "trustworthy" by taking responsibility for her own actions and admitting when she's made a mistake. She is considered "reliable, open, competent, honest and knowledgeable."

She is "trusting of others" because she allows her staff to perform their job without micromanagement and includes them in policy decision making. She keeps her staff well-informed with the latest changes in policies and does not assign blame when mistakes happen, but looks at mistakes made as learning opportunities.

Jennifer Johnston was presented with a LINQ award for being "Approachable" on May 24th, 2006. Jennifer is a people focused extrovert, who is genuinely interested in people, and is sought out because of it. Every day Jennifer is approachable. Staff can approach Jennifer about any issue. Congratulations, Jennifer!

A LINQ award was presented to Rae Ann Laubenstein for the Approachable quality on Tuesday, June 20, at 2:30 pm in Gerberding Room 142. Rae Ann is very open to assisting those outside of FM with any and every question that they have, often going out of her way to take care of scheduling tasks. Rae Ann has a good sense of when meetings are very important and goes above and beyond the call of duty, not only being diligent in her scheduling efforts, but making the meetings extra special by paying particular attention to detail and how FM is represented. "Rae Ann sets herself as being approachable by the example that she sets."

Q-STEP Awards

On March 1, 2006 Lily Gebrenegus received a Quality Staff Exceptional Performance (QSTEP) Award for demonstrating the quality of Collaborative. Lily's teammates describe her as "dynamic" and a "go-getter." She is an enthusiastic member of GCA and if she needs an answer to a problem, she finds it quickly and shares the information with her team members. She has extreme attention to detail and often "catches things that other people may miss." Lily is involved in many teams throughout Financial Management and maintains an upbeat and positive attitude while balancing all of the tasks that she takes on. “Lily is friendly, outgoing and happy. When people enjoy their job, they show it and Lily enjoys her job.”

Kyra Worrell from SFS received a QSTEP Award on April 1, 2006, for demonstrating the qualities of Collaborative and Committed.

Kyra always looks for ways to improve group dynamics and get feedback and input from others. She collaborates daily with undergrad education and does an excellent job reaching out to campus process partners. Kyra also likes challenging projects and does a good job continually improving her skills so she can collaborate more effectively. Kyra exhibits committed qualities in that she is dedicated to her outreach process. She offers time, energy, ideas.

Juinette Schrijn in Payroll received a QSTEP Award on April 21st, 2006. She received the award demonstrating the quality of “Collaborative”. Juinette’s co-workers describe her as “good with people” and very “patient”. She is described as proactive and always going above and beyond her job duties and volunteering for any odd jobs when needed. Congratulations, Juinette!

Elvin Smith was recognized with a Q-STEP award on 9/27/06 for the quality of “Trustworthy”. Elvin was described by co-workers as “100% reliable” and an “invaluable member of the team”. He was also described as being technically competent and a person who maintains a calm demeanor when under stress. Great job, Elvin!