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DIRECTIONS

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EIT Retreat, October 6-8, 1999

Susan D. Camber, Grant & Contract Accounting

Several of us started the retreat with a “stroll” to the big trees before dinner. We started together in a pack, but soon spread out. Ruth and Doug led the way, trying to convince us that the big trees were “just around the next corner.” Ann and I followed, not terribly convinced, as the stroll turned into a hike. Susan and our facilitator Debby brought up the rear. They really had intended going on a short walk and wanted nothing of the steep hills ahead. We ran into Frank on the trail doing some bird watching. He joined us for the latter part of the walk and shared his knowledge of native birds with us. As a result of our hike, several of us were late for dinner, some more than others. We were reminded that dinner the next night was at 5:30 PM sharp! Guess we’d better think twice in the future before setting out for parts unknown.

We then gathered in Pack Hall for some ice breakers. We first broke into birth order groups (firsts, middles, babies, onlys) and answered some past, present and future trivia. I’m proud to say that the middles won - at least by our scoring criteria! Next, we came

up with personal, local and global milestones for the 70’s, 80’s and 90’s. Some of us have better memories than others and it was surprisingly difficult to come up with global and local events for the 80’s. Must have just been one of those decades!

We then previewed a potential training movie called *Who Moved the Cheese* and quickly turned a thumbs down. It was far too cheesy!!

We retired to our cabins and dorm rooms. The sleep was better for some than others. The rooms ranged from little cells with short single beds and a dresser (and almost enough room to turn around) to individual dorm rooms that were a little roomier with two beds and room to breathe.



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EIT Retreat (Cont'd)

We woke up Thursday morning and headed for a filling Pack Forest waffle breakfast. We talked most of the day about Strategic Planning, welcoming Gail Zucker, a consultant working with UW Training and Development, to lead parts of our discussion. She walked us through the status of current Strategic Planning efforts at the UW and showed us her Strategic Planning model. We broke at 10:00 AM for cinnamon rolls and then returned to elicit Gail's suggestions on how we might implement Strategic Planning in Financial Management.

After a lunch of deli sandwiches, we returned to talk more about our Strategic Planning questions. We talked about what we've done and need to do in Financial Management and shared experiences from our individual units. Earlier in the day, our facilitator, Debby Seaman, had given us each several hundred "dollars" which we were free to share with our teammates as we saw fit. The money started rolling as everyone showed appreciation for the Strategic Planning done in individual units and the willingness to share those ideas.

In the evening, we had a dinner manicotti topped with marinara sauce or chicken. By now, wallowing in filling meal after filling meal, some of us were beginning to lose our appetite. After dinner, we went back to our cabins for a little rest and reading. At 7:00 PM, the designated "party cabin"—occupied by Doug, Ruth and Susan—hosted a gathering for all interested in attending. The conversation was lively and it gave us a great opportunity to learn more about our teammates.

After another large meal on Friday morning, we changed gears slightly and took a look at the EIT—our purpose, membership, roles,

goals, measures, decision-making, agendas, logistics, ground rules, trust and commitment. We agreed on some minor changes but, overall, plan to keep the structure of the EIT as it is.

It was a refreshing but hard-working retreat. We came away with a strong commitment to develop a Strategic Plan that will help guide Financial Management into the future.

Empowerment

Anthony Amaratunge, Payables Administration

At the QI Awareness Training, held November 4-5 1999, Verna Blackhurst, Stepheny Bonner, Denise DeNeve, Margret Petrie and Elvin Smith were asked why should employees be empowered. They came up with the following ideas:

- Better participation in decision-making
- More job satisfaction
- Higher morale
- Increases confidence
- Contributing value to organization
- Involvement
- More productive
- More creative
- Willingness to take risks
- Desire
- Motivation
- Less sick leave
- Effective streamline
- More accountability
- Reduces mistakes
- Input respected
- More trust in both ways

Financial Management believes that collaborative management and open communication are important factors in ensuring superior service. The quality of our services contributes to the financial strength of the University and that quality is everybody's business—from new employees to the Assistant Vice President. Therefore, we need total involvement in quality improvement from all in Financial Management. This is where employee empowerment plays a vital role.



Career Planning CD

Anita Bingaman, Payroll

I have completed most of the new career planning software program *Development Works* and I would like to recommend it to anyone wanting to prepare for job enrichment or a career change.

It stresses the importance of taking responsibility for developing our ability to expand our contribution to any organization in which we work. It emphasizes that we all have valuable contributions and that these contributions can link our individual satisfaction and performance to the goals and challenges of the organization. What could be a better win/win situation?

I am in the process of reading a book on the Lewis and Clark Expedition and I'm struck by the similarity of preparing a career development plan with the preparation Merriweather Lewis undertook before beginning his journey into unknown territory, searching for the water route to the Pacific Ocean.

The expedition's mission was to make maps of the territory, to document the nature of the terrain, plants and animals, and to gather information about the native peoples. Lewis had some experience living in the wilderness, but to be prepared for this journey he was provided with crash courses in botany, medicine, map making, and surveying.

With the ever changing work environment, we are also traveling into the unknown and need to prepare ourselves. Fortunately, Financial Management has provided us with various tools to prepare ourselves for future changes. I recommend *Development Works* as a tool for discovering how you can find more self-satisfaction while expanding your ability to contribute value to your current job or a new job.

Contact Tracy McIntyre at 543-4990 to check out a copy.

Champion to SFS?

Ruth Johnston, Variousy Located

What's this? Ruth is going to lead Student Fiscal Services? She's a quality improvement specialist and trainer...but a financial person? How can that work? These were some of the questions that arose behind closed doors shortly after the announcement was made of Cindy Fenwick's departure and Frank Montgomery being asked to assume her duties. They were normal questions and worthy of response.

So, can a Champion make this kind of move successfully? That remains to be seen...V'Ella Warren's confidence in me, and commitment to developing people who can move throughout the organization, is being demonstrated in this move. The leaders in FM have been working toward developing leadership qualities and behaviors that are transferable within our units; successfully experimenting with giving people opportunities to demonstrate leadership in new ways.

I was not moved to this position without some background. My career in higher education started with students, serving in residence halls at three universities and working in admissions at one. My philosophy is developmental—wanting to assist students to grow and develop in their college years so they can assume the responsibilities of adulthood and continue with lifelong learning. So, I bring ideas for educating students about debt management, helping them work through our morass of rules and bureaucracy, and helping them make good decisions for today and the future. My philosophy about leading people is similar—

My philosophy is ...wanting to assist students to grow and develop in their college years so they can assume the responsibilities of adulthood and continue with lifelong learning.

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Becoming a Learning Organization: Inciters' Role

Anita Bingaman, Payroll

“Learning in the context of a learning organization does not mean acquiring more information, but expanding the ability to produce the results we truly want in life.”[†] It means identifying what we want (having a vision) assessing where we are at the moment in relationship to that vision and then doing what is necessary to make that vision a reality.

I really like the sound of those words – “to produce the results you truly want in life.”

This team is very energetic and has many new ideas for carrying on the great work of the previous teams in creating a learning organization.

They are very empowering and proactive. The word “produce” makes me think of craftsmanship—where a work of art is the outcome. I guess that, in this case, the work of art would be myself. What a wonderful thought—watching myself grow (although there are parts of me I wish would stop growing.) Perhaps seeing a creation take

place would be a better way to put it. It is also a joy to see others grow and blossom.

The beauty of all this is that I am working in an organization that is committed to personal growth. Financial Management through its sponsorship of the Inciters Team is carrying out its commitment to growth of its staff. The Inciters have been a team for about six years. It has had a variety of members and worked on different projects. The most recent Inciters put together the Employee Development Plan, which walks you through identification of goals, helps in looking at where you are now and then guides you in developing a plan “to produce the results you truly want in life.” Your very own development plan helps define what training

or activities you may need to reach your goal.

The first team looked at how training was being conducted throughout Financial Management and came up with the Rubric to bring consistency to how training was managed. Another driving force for the team was that in surveys on staff needs, training was always high on the list. A continuing activity of the team is to oversee other learning opportunities, which include Awareness Training (an introduction to the Quality Improvement Process), Process Improvement, Facilitator Training, Team Effectiveness Training, Recognition Training and Customer Service Training.

The team is just starting a new phase. The leader is Anita Bingaman (Payroll), and the new members are Libby Graham (Payables Administration), Diane Harker (Travel), Denise Lim (Grant and Contract Accounting) and Ming Wang (Student Loans and Receivables). Tracy McIntyre, Financial Management, is a continuing member from the previous team. This team is very energetic and has many new ideas for carrying on the great work of the previous teams in creating a learning organization.

One of the Team’s ideas is to find more ways to be in touch with all of you, our customers, to provide the kind of educational opportunities that meet your needs. We will be asking for time to speak at your staff meeting and making our presence known wherever possible. We also invite you to contact any member of the team at any time with your ideas and/or questions. In a sense, you all are ad hoc members of the Inciters Team whenever you ask, “What do I need to

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RECOGNITION REVIEW

LINQ

On October 21, Ruth Johnston became only the second leader to qualify for all four LINQ behaviors—Trustworthy, Trusting of Others, Approachable and Inspiring (Ann Anderson was the first). Space does not permit an airing of all the comments made in support of the nomination, but the following perhaps summarizes Ruth best: “Ruth has a way of listening in a nonjudgmental manner, even when you are telling her something she doesn’t particularly agree with—such as your opinion that you cannot do what she just asked you to do...somehow you come out of the discussion feeling as if you can do what you thought you couldn’t do.”

QSTEP

Gena Brooks received a QSTEP award on October 1 for the behavior of Committed. Gena consistently demonstrates commitment to quality improvement principles; believes in, shows excitement toward and is dedicated to her job; develops effective relationships with customers and coworkers and accepts challenges with eagerness.

Jim Caldwell was honored at a QSTEP ceremony on December 2 for the behavior of Collaborative. Jim listens in a nonthreatening and nonjudgmental way and participates willingly and actively in his work unit, department and on teams. Further, he shows a genuine interest in others and works effectively with others in meeting customer needs and improving work processes.

TOPS

The One-Stop Team (Keith Ackerson, Mirian Gavey, Deirdre Green and Nancy Hurja) received a TOPS on September 2 for developing the one-stop shopping concept for students at Schmitz Hall. Improvements include an information kiosk/building directory and payment slot overhaul. These efforts addressed customer needs with long-term improvement and opened channels of communication with students.

The Inciters Team (Linda Braziel, Pramilla Chand, Cindy Gregovich, Ruth Johnston, Rae Ann Laubenstein, Karen Long, Tracy McIntyre, Sandie Rosko and Jane Wiseman) was selected as a TOPS recipient on October 12. Among other achievements, this team created the Training Rubric, which resulted in open lines of communication between staff and leaders and consistent standards of providing T & D opportunities.

The LEAD Team (Jocelyn Bautista, Gordon Hammond, Ruth Johnston, Yee Lam, Dan Lemire, and Supremo Manabat) was awarded a TOPS on October 21 for developing the Leadership Training Program. Cited as improvements were: creative process and outcome, cost/time savings, long-term improvement and opening channels of communication.

Phil Corcoro won a TOPS on October 19 for developing spreadsheets to convert UW accounting data into state accounting format. The improvement reduced processing time by 75%—a long-term improvement which was the result of creative design.

Champion (cont'd)

creating a work climate aimed at providing excellent service, that's collegial and empowering, focused on continually improving systems and processes. Aside from that, I've worked with SFS staff quite extensively over the last five years.

I'm beginning this new role by meeting one-on-one with interested staff, working with the leaders to begin developing a strategic plan, and posing a lot of questions that haven't been asked or thought about before. I'm also learning about critical issues of what information is okay to release, budgets, electronic tracking and web based payments. Frank and I are working closely together—he is serving as a technical mentor, helping me learn about the key issues, and as someone I can bounce new ideas off for response and insight.

So, what about the Champion role? I've delegated some of it: Niki Dorn is leading a new LEAD Team; Anita Bingaman is leading a new Inciters Team; Diane Cooley is now editor of Directions; and Tracy McIntyre is taking a greater lead in coordinating Quality Improvement information and activities. I continue to provide training (Awareness, EDP Workshop, Myers Briggs Type Indicator feedback sessions, Facilitator Training) and serve on the EIT, but I am not as available to



"Let's form a committee to create a task force to develop a team to determine the fastest way to deal with the problem."

work inside other FM departments as I was previously. We are contracting with T&D for some trainers and training, and asking EIT members to take a greater role in orienting their new leaders and leading improvement and communication efforts.

For the present, it seems to be working. Over time we'll need to reevaluate how both functions can best be served. We'll be asking for input from all of FM as we proceed with strategic planning and organizational structure/leadership issues.

I have to admit that these new duties have given me new energy, new ideas and drive. I enjoy working with the SFS staff and leaders—collaborating on and coming up with new ideas and ways to work. I'm learning so much, some I'm interested in and some that overwhelms me with its complexity. It helps to have such a knowledgeable and willing staff to guide us through this transition. Thank you all for both the opportunity and the support.

Becoming (cont'd)

expand my abilities to produce the results I want in life and/or what is needed in Financial Management to produce the results this organization wants to meet its customers' needs?" "...learning organizations are not possible unless they have people at every level who practice it."[†]

[†] These two quotes are from the book *The Fifth Discipline, The Art and Practice of The Learning Organization*, by Peter M. Senge.

DIRECTIONS

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Measuring Performance

Know Where You Are To Know Where to Go

Delynne Lahtinen and Tim Lavin, *Grant & Contract Accounting*

The Strategic Planning process in Grant and Contract Accounting has been in an acceleration mode over the past eight months. As reported previously in *Directions* (Summer '98 and Winter '99), GCA has built the foundation for a successful plan. With significant guidance from Ruth Johnston and a coordinated effort by the staff and leaders of GCA, we have developed our value statements, set forth our vision and composed our mission statement.

Integrating our values, vision and mission, we have established four strategic goals. In order to achieve these goals, we have set sixteen key performance measures that will be tracked in order to provide the necessary feedback to judge our performance to goal.

GCA Goals and Related Measurements

Our goals are detailed below. For each goal we have selected key organizational measurements that we believe are essential in meeting our mission. For each measurement we have established performance objectives that will tell us how we are doing in our progress to realize our plan.

Goal: Excellent stewardship of research funding through organizational health.

Measure:

1. Productivity by tracking cost to manage one budget.
2. Customer needs through periodic customer service surveys.
3. Employee needs through an employee satisfaction survey.
4. Professional growth through participation in employee development planning and team membership.
5. Staff turnover.

Goal: Excellent stewardship of research funding through cash management.

Measure:

1. Reconciling items in our Federal cash reconciliation process.
2. Unidentified cash receipts.
3. Outstanding accounts receivable balances.
4. Number of budgets with deficit balances.
5. Number and dollar of invoices submitted.
6. Expenditure reimbursement process.
7. Reconciling items in the receivable cash process.

Goal: Excellent stewardship of research funding through reporting.

Measure:

1. Timely submission of financial status reports.
2. Timely submission of Federal Cash Transactions Reports

Goal: Excellent stewardship of research funding through compliance.

Measure:

1. Processing time for setting up new budgets.
2. Cycle time for processing Requests to Transfer Expenditures (RTES)

As we move forward in our strategic planning process, our focus will turn to using our measurements to bridge the gap between our current performance as an organization and our desired performance as outlined in our strategic plan, developing specific strategies for improving processes.

We will also be presenting our plan to Financial Management for valuable feedback.

...we have developed our value statements, set forth our vision and composed our mission statement

Payroll Customer Service Crusade

Heather Norberg, Payroll

The Payroll Office has undertaken the task of improving customer service. Niki Dorn, Director of Payroll, has put together an enthusiastic team comprised of Anita Bingaman as lead, Cathy Stewart and Heather Norberg. The initial assignment was to create and present a customer service workshop. After the first team meeting it was obvious that there are many tasks ahead. The team set a goal to encourage a high standard of customer service in the Payroll Office by moving customer service to the forefront of staff consciousness. We will reach this goal by providing tools to enable individuals to examine and take responsibility to improve their own level of customer service.

After surveying payroll coordinators and our own staff, we determined that overall our attitude is great but there are some areas that need attention. The qualities that were determined to be most important for customer service are: professional, knowledgeable, reliable, courteous and quick. Several brainstorming sessions were held in staff meetings to determine a working definition of these terms.

The office received high praise for the new on-line system, friendliness and improved organization. However, there were some concerns about the length of time that it takes to get a response to voice mail and email, accuracy and not knowing who to call for specific issues.

Several issues have already been addressed and many others will be solved in upcoming months. Our web page is now easier to access and includes schedules, contact information and direct deposit forms. You can reach us at www.washington.edu/admin/#payroll. There are changes being made at the front desk to speed up the check-in process and our staff is working on responding to calls faster. Some concerns have been forwarded to the management team for discussion and resolution.

The next step is the workshop. The team is planning an intensive, hands-on training, which will focus on payroll customer service issues. The four qualities as well as good communication with customers and fellow staff will be primary topics. Tips on prioritizing tasks and dealing with stressful times will also be covered. The idea is to create an atmosphere in which customer service is second nature because difficulties are handled proactively.

Customer service is now a focus of the entire office. We are more aware of how well we work together as well as with customers. The team is dedicated to a long term project and will continue to highlight customer service long after the workshop is over. New staff will receive training and guidelines and refresher courses will be given at staff meetings. Payroll is well on its way to having the best service ever.

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