

New Directions

Quality Improvement in Financial Management at the University of Washington

Vol 3, No 1

HEADLINES

Winter 2004

Letter from the Editor, Winter 2004

by Chris Malins

Happy New Year! Looking out my window, I can see the snow swirling on the street and piling up on the sidewalks. The few hearty souls who are braving the weather are covered from head-to-toe to escape the cold. There is no question: the new year has brought to Seattle a classic “cold snap.” We’ve come a long way from the lazy days of summer! In the warm editorial offices of Directions, we’ve decided to give you a winter issue that will counteract the cold and dark of the season and warm you up until spring. That’s a lot to shoot for, but we’re ever ambitious at Directions, so we went for it. You’ll have to tell us if we succeeded.

Take a look at these toasty articles that are hot off the presses:

- Moody’s Upgrades UW Bond Ratings
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- Becoming Knowledge Driven—Changes in Financial Services
- Financial Services Retreat Results in Development of Two New Teams
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EIT Retreat 2003 – Celebrating the Past and Planning for the Future

by Karen Crowder

Have you noticed that the only thing you can count on is that nothing stays the same? Financial Management is about to experience new opportunities to show how flexible we are and how willing we are to learn and grow

I attended the EIT’s annual retreat held on October 8–10 at the beautiful Pack Forest Conference Facility. I gained an understanding and appreciation for the strategic changes that are being worked on in Financial Management. I’m hoping that I can be of help in supporting the rest of FM in understanding the strategy. It’s really very exciting.

Kris Box, a private consultant who worked with the EIT before, was an excellent facilitator. She kept people focused, engaged and moving forward. And, let me tell you – the EIT can WORK a process! I was incredibly impressed with the way they moved through the information and activities and ended with workable plans.

The first part of the first day was spent listing Financial Management’s accomplishments since the last strategic planning session with Kris. The list was incredible. While I know people are always working on making things better, the list was very impressive and indicative of hard work throughout the organization.

As you have no doubt heard, Financial Management is moving away from transaction work and toward a time when we will be knowledge driven. Since all of us are knowledgeable in one way or another, I think there is some confusion about what that means. It really is a different way of doing business that requires an expansion of skills. Workers in FM will be expected to create knowledge, share it

effectively, make individual and independent decisions, and build close relationships with customers for problem solving and prevention. In a department that is very “bottom line” oriented, the strategic initiative means an additional focus on relationship building and interpersonal skills

We then worked with a Strategic (different from Operational) Dashboard that was broken into quadrants: customer perspective, financial accountability, internal processes and learning and growth. Within

these quadrants, there was extensive discussion on what initiatives were needed to establish standards and measures across Financial Management. Despite the array of services provided within Financial Management, the goal is to come up with an integrated strategy for the whole organization. This is exciting work. So, open up those minds and eyes and get ready to continue the ride that is the ever-improving life in Financial Management! You’ll be hearing more soon.

Moody’s Upgrades UW Bond Ratings

by *Chris Malins*

If you’ve ever tried to borrow money for a car or a house, you know how important your credit report is. UW also has a credit report of sorts, called a bond rating. The quality of this rating determines how flexible borrowing terms are when funds are needed for construction projects, but primarily a higher rating means lower cost of borrowing. Moody’s Investors Service, one of the “big two” rating agencies, recently upgraded the UW’s outstanding debt, as well as future debt.

Public universities are rated by nationally recognized rating agencies; Moody’s, Standard & Poor’s, and Fitch; both on the strength of a particular transaction and on the strength of the entire institution. The higher the rating, the lower the interest rates are on money that is borrowed and the more flexible the terms of the debt. Aaa is the highest rating any bonds can receive, while anything below BB is considered a “junk bond.” For complete information regarding Moody’s rating definitions see the following link:

<http://www.bondtalk.com/global.cfm?S=rultra&S=moody#ltus>

Moody’s recently visited the UW to review and rate our new borrowing platform, something that we call Non-Appropriated Local Funds or “NALF.” NALF is a pool of funds that will be used to pay back bonds for future research buildings. Just like any good bank, Moody’s wanted to better understand the fundamentals of the UW’s financial picture, from our current revenues to our reserves.

A small group of UW staff made the case for a high rating for NALF to Moody’s; Harlan Patterson, Doug Breckel, Scott Davies, Jeff Follman, and Chris Malins. The presentation was over two hours long, followed by a tour of the campus, and capped off with a delicious lunch at McMahon Eight. Needless to say, Moody’s was impressed.

With respect to the NALF platform, Moody’s gave UW an issuer rating of Aa1 for research debt. Aa1 is just one notch below the highest rating available, Aaa, and put UW in elite company. In 2002, only three public schools had an issuer rating of Aa1: UNC-Chapel Hill, Georgia Tech, and Texas A&M. UW is proud to be part of this group.

In addition to this issuer rating on future debt, Moody’s also upgraded outstanding auxiliary bonds; \$51 million of Housing and Dining System Bonds to Aa2, from Aa3, and the University’s \$16.3 million of Intercollegiate Athletics (ICA) Revenue Bonds to Aa3, from A1. Although the upgrades on existing debt don’t impact the interest rate on those particular issues, they will impact any future debt that ICA or Housing and Dining may want to issue.

These recent upgrades have a direct impact on the cost of funds for bonds, but behind the rating are a lot of people working together who make UW a success. Moody’s noted the strength of the research enterprise, healthy reserves, and strong operating performance despite a difficult statewide funding environment.

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

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

Becoming Knowledge Driven— Changes in Financial Services

by Ann Anderson

The Financial Services organization has been undertaking a transformation. What began five years ago as minor tweaking has blossomed into a reorganization that will set a foundation for the future of Financial Services. Financial Services is a unit in Financial Management that includes the following departments:

- Payables Administration
- Travel
- Equipment Inventory
- Procurement Card Administration
- Administration/Data Entry

As a result of opportunities resulting from increased technology, the work of our unit is being transformed. We are using data to make decisions more than ever. We are evaluating risk in assessing the degree to which we will monitor compliance. We are more customer service focused than ever in the past. We are increasingly expected to provide evidence of our efficiency and effectiveness. As a result, we are evolving into a knowledge-driven organization. What does it mean to be “knowledge-driven”? For starters, it means the organization is less focused on processing transactions. Rather, more effort is directed to activities such as analysis, problem-solving (sometimes even before problems occur!), outreach, training, and using data to make decisions and to deploy resources. The Lead Team has defined transaction-driven as focusing on “processes that require repetitive or routine work day after day”. In contrast, the Lead Team describes knowledge-driven as:

- Creating knowledge – knowledge of what our customers need before they even know they need it;
- Sharing knowledge – amongst ourselves, with our process partners and with campus.

We have traditionally been a transaction-driven organization. This work is increasingly migrating to technology and on-line processing. Thus,

the structure of the organization needs to reflect this new and emerging reality. We are becoming knowledge-driven. An organization that considers itself knowledge-driven should be structured as such. In Financial Services, this has resulted in establishing positions focused on customer service, analysis, problem solving, and data analysis. Over the last five years, we have been slowly reallocating our resources to support a new organizational structure. We have established a customer service unit in Payables Administration, established the Procurement Card Program, and hired a Financial Data Analyst. Knowledge activities include the creation of and active use of our Operational Dashboard (similar to other Financial Management units), training conducted by all units, analyzing department activity using specific transaction data, migrating forms and information to the Web, and implementing document imaging. And, we need to do more.

This has been an ongoing journey. Most recent reorganization activities consist of establishing additional customer-focused positions, including two supervisor positions. We have also reclassified other positions to more consistently represent ourselves as a fiscal organization. An example was to submit requests to Human Resources to reclassify program coordinator positions in the Travel Office to Fiscal Specialists. While we don’t underestimate the impact of the transformation in terms of change management as well as managing both knowledge and transaction work in the transition, we believe these actions will result in the following knowledge-driven outcomes:

- Providing better customer service to campus
- Sharpening our ability to solve problems
- Expanding the skill base of our staff
- Providing additional career paths in Financial Services

This transformation will not end with our recent activities. The journey will continue as long as our work is impacted by technology, customer expectations increase and change, and our desire to maintain an organization that is both vibrant and competent continues.

Financial Services Retreat

Results in Development of Two New Teams

by Donna Andreason

The Financial Services group, under the direction of Ann Anderson, met for their second annual retreat on October 22, 2003. The primary focus of this retreat was to discuss the results of our 2003 Financial Management employee satisfaction survey. While the results of this survey met or exceeded industry standards in most categories, there is still room for improvement which we wanted to address.

This year's retreat was led by Debbie Seaman and members of the Financial Services leaders team with the assistance of FM-trained facilitators. The session began with a colorful exercise which helped demonstrate everyone's learning, communication and leadership style using Personality Color charts. After

Welcome to New Financial Management Departments, Risk Management and Key Disk!

by Randi Adair

Financial Management is pleased to announce the addition of two new departments to our organization—Risk Management and Key Disk! These departments have long been process partners with various departments in FM, so we welcome the opportunity to work with them more closely as part of our team.

Risk Management (RM) is a department whose main responsibility is “organizing, coordinating, and carrying out programs to control the risks to which departments and, ultimately, the University are exposed” (see Risk Management's website, <http://www.washington.edu/admin/risk/>). RM's sixteen person staff transferred to Financial Management from Business Services, but for the present, RM's move is purely organizational in nature—their working groups plan to stay in their present Gerberding and Roosevelt Commons offices. Elizabeth Cherry, RM's Director, is very excited about being part of the FM, particularly due to the opportunities provided by FM's Quality Improvement Program. In addition, she says, “this move is a great opportunity to work more closely with people that we've had contact with in the past. We've found everyone in Financial Management

a lunch break, everyone broke into groups to discuss the major items found in the employee satisfaction survey that could use some work. We were asked to expand on the following issues:

- Financial Services employees would like a clear idea of learning and growth opportunities and what is expected of us.
- Clear and open communication between departments, Financial Management leaders and staff
- Explore and limit office politics and favoritism
- Provide an atmosphere where staff can have trust in leaders

Two teams have been created based on the results of this retreat; a cross training team and a team to address perceptions of office politics and favoritism. Both teams will meet in January to discuss the specific concerns of their topic and the direction each team will take in the following months.

to be extremely helpful and welcoming.” Please read about Risk Management's latest accomplishments at FM 101: Risk Management—More Than Just Insurance.

Key Disk is the second addition to Financial Management. Key Disk is a two-person group who enter manual invoices, check requests, journal vouchers, travel expense vouchers and more into the Financial Accounting System. Their job is the final step in the manual payment process and in applying transactions to campus budgets. Key Disk will be transferred into the Financial Services department from Computing and Communications, and will also remain in their present location in the Payables and Accounting Building.

Welcome to these new Financial Management members!



Responding to the Employee Survey: The SFS Journey

by Ruth Johnston

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INNOVATIONS

More than Just a Dream—An Update on Financial Management's Mentoring Program

by Marisa Honig

On November 19, 2003 the DREAM (Diversity Recognition Edifies Advanced Mentoring) team sponsored a three hour Mentoring Check-in for Financial Management's first group of official mentors as they reached the halfway point in the one year program, which was launched in May 2003. The three hour workshop was held in the ECC Native American Room and was facilitated by Ruth Johnston, QI Champion and Dream team sponsor.

The workshop began with a discussion of some of the benefits of mentoring. These benefits include encouraging diversity, improving communication and both personal and professional growth for mentors, as well as mentees. Enthusiasm and energy were high as mentors moved into small groups to share experiences, ask questions and offer each other ideas on ways to further improve their current mentoring relationships. Topics ranged from logistics (when and where they met with their mentees) and goal setting to communication and personal insights. As discussion moved to the large group, a number of

mentors commented that both mentors and mentees were gaining confidence as a result of participating in the program.

After the large group discussion, Karen Crowder, Financial Management's Training and Organizational Development Specialist, provided a special session on giving and receiving effective feedback. Mentors then moved back into small groups to discuss four case studies that explored some common issues that can arise in mentoring relationships and brainstorm solutions. It was inspiring to see the mentors' level of commitment and caring.

Did you know that January has been made "National Mentoring Month" by presidential proclamation? As part of the celebration the DREAM team and the RAVE team are co-sponsoring an exciting FM-wide event! On January 29, 2004 from 1:30 p.m. to 3:00 p.m. please join us in the Ethnic Cultural Center's Black Room for an afternoon of desserts and diversity! You won't want to miss our special guest speaker, Dr. Rusty Barcelo, Vice President from the Office of Minority Affairs, who will share her incredible story and experiences with mentoring! In addition to Dr. Barcelo, a mentor and mentee from FM's current

mentoring pairs will talk about the program and share their experiences. This is a wonderful opportunity to learn more about the program from the participants themselves!

The Dream team will be launching our next group of mentoring pairs in March 2004! As Benjamin Disraeli said, “The greatest good you can do for another is not just to share your riches, but to reveal to him his own.”

Feel free to contact the Dream team for more information on the mentoring program and upcoming events. Current Dream Team members: Jaeson Albritton, Heidi Anderson, Erlinda Antonio, Linda Braziel (team leader), Marisa Honig, Ruth Johnston (team sponsor), Denise Murillo, Thanh Nguyen and David Wright.

You can also visit our website at: <http://www.washington.edu/admin/finmgmt/pmp/>

FM 101: Risk Management— More Than Just Insurance

by Shari Spung

Financial Management has a new department! Effective 11/1/03, the Office of Risk Management moved under the Financial Management umbrella. The 16 staff members are very happy to be part of Financial Management and are eager for others to know more about what Risk Management is all about.

Formerly reporting to Business Services, the Office of Risk Management is led by Elizabeth Cherry. Elizabeth and her staff manage a variety of insurance programs for UW that total approximately \$61 million. The staff is a diverse group, including several attorneys and risk management/claims professionals. Here’s a link to Risk Management’s Organization Chart (it will open in a new page). Use your back button to return to this page.

There are 5 programs in Risk Management:

- Risk Consulting provides services to all of the schools and colleges of UW. They also do consulting with all academic and administrative units on reducing, avoiding, and transferring risk.
- Risk Financing manages the various ways that losses are financed at UW. For predictable losses such as auto, general liability, employment practices, and medical malpractice, UW self-insures through Portage Bay Insurance (PBI). PBI is a “captive” insurance company owned by UW. PBI contracts with UW for financial and claims management services. The formation of PBI in July of 2002 allowed UW access to the reinsurance market, which has saved money and allowed for a more effective

program of self insurance. For less predictable losses, we choose to insure through commercial policies – we have over 60 of them covering our various exposures. Some other risks are handled through non-insurance, such as business risks and construction disputes.

- Claim Services administers the handling of tort claims (claims for civil wrongdoing) made against UW and its hospitals and affiliated medical sites. In addition to resolving claims, this group works closely with its clients on communicating “lessons learned” so that losses can be reduced or eliminated in the future. A robust claims management system collects data on claims to form the basis of trends which are monitored for loss reduction.
- Workers Compensation assists UW supervisors in bringing injured workers back to work. They work closely with the Department of Labor and Industries to make sure their handling of our claims is appropriate and that the University is in compliance with statutory obligations. They also develop loss intervention strategies to reduce UW’s premium that is paid to the Department of L & I.
- UCIRO (University Complaint Investigation and Resolution Office) investigates discrimination, harassment, retaliation, and scholarly integrity complaints which are made before a claim is filed. Because they are able to resolve viable complaints in advance of a claim or lawsuit being filed, they contribute directly to reducing claim and litigation frequency.

You’ll hear more about Risk Management and their staff in upcoming editions of *New Directions*.

Look At All We've Done

Compiled by the EIT, reported by Kate Riley

At our annual EIT retreat this year, our attention was focused on the new approaches we could take to achieve our vision. You'll notice in the side box that we have revised our vision—be sure to take a look at the new statement. But before we took up planning a new direction, we reflected on all that we had accomplished from our previous strategic plan, developed in 2001. Below you will find our four strategic initiatives from that plan and the many ways in which we advanced our strategies.

1. Move from being transaction-driven to being knowledge-driven

- Chartered a FM-wide team, the Lead Team, to develop a plan to achieve this initiative. The team has created a model for being knowledge-driven, made presentations to departments, and launched work to standardize knowledge about key processes, develop training, and create a standing communication team.
- Several departments have or plan to reorganize to support being knowledge-driven (e.g., Financial Services).
- Staff capacity to become knowledge-driven has been supported through various initiatives and personnel hiring—diversity and mentoring initiatives, CPA licensing team, CPE credits, and hiring for project management skills.
- FM is sharing knowledge with campus through a monthly newsletter that highlights improvement developments.
- Departments have created or work with existing advisory groups to share and receive knowledge about customer preferences and needs (e.g., Financial Services, Payroll, SFS, RAA, and Treasury).

2. Mine data to provide customized services and information

- New positions have been created to support data mining, analysis, customer outreach, and other knowledge-driven work (e.g., Financial Services, Financial Accounting, SFS, and RAA).
- Data mining results have been used to understand what direction to take to improve under-perform-

ing processes (e.g., GRIP team, ATA Team, and SFS).

- Departments have conducted targeted outreach activities to customers based on customized data analysis (e.g., Treasury, Financial Services, and Financial Accounting).

3. Replace paper or legacy systems with web or other electronic solutions

- Departments have introduced web-based processing in many areas—GCA lockbox, E-Perkins, Stafford loan, short-term loan application and extension, on-line exit interviews for borrowers, OWLS, and ProCard reconciliation.
- New web-based forms have been introduced—for example, on-line TEVs and check request forms for student and staff payments.
- Payment options via the web are now available using credit cards and automated cash transmittal.
- We have posted an array of communication pieces and reports to the web including investment and endowment reports, the Annual Report, FM Directions newsletter, the Employee Satisfaction Survey, FM training request forms, and departmental and division dashboards.

4. Use a common measurement system

- Operational dashboards have been created at the division, department and, in some cases, team level. The dashboards are regularly reviewed to charter action that either improves the measure or improves an under-performing process.
- Dashboards have been used to communicate with department staff, campus process partners, senior UW leadership, and external universities.
- An on-line employee satisfaction survey was introduced that provided external benchmark information.
- Department staff responsible for their dashboards have been brought together as a team to ensure consistency in how dashboards are created and used and to provide on-going support for this work.
 - Financial Services created a shared measure with Purchasing on aspects of the purchasing-payment process.

SFS Outreach Expansion

by Kyra Worrell

Process improvement can come in many forms. It can range from shortening the time it takes to do a daily task by switching from paper to email to creating a whole new administrative unit. Student Fiscal Services took the latter approach when the Outreach unit was created in the summer of 2001. The Outreach unit was created as a new way of providing service to students and the UW community. Outreach has continually expanded and improved during these first two years of its existence.

The focus of the Outreach unit is to “reach out”—get information and knowledge out to students and departments before problems can begin. To that goal, Student Fiscal Services Outreach took on the huge task this summer of making contact with the over 6,000 new Undergraduates who came to campus for Fall Quarter, 2003. Outreach developed the presentation “Managing the Maze” to alert new students (and parents of new students) to financial deadlines, such as the tuition due date, and important tips, like how to sign up for direct deposit of your financial aid. “Managing the Maze” emphasizes the ease of electronic and remote transactions so students can focus on their academic and social life. Outreach presented “Managing the Maze” at:

- 44 Freshman Orientations
- 20 Transfer Orientations
- 8 Parent Orientations

Outreach also offered financial planning in the form of their “Money 101” workshop to all of these new students. It was exciting to see students taking time out from the ice cream social and the big football game to come learn about managing their money!

The SFS Outreach expansion didn’t stop with new freshmen and transfer students.... Outreach had a very busy summer! Outreach talked to several groups, ranging in age from junior high (get them while they’re young!) to graduate students and graduate student program coordinators – here’s a sample list:

- African Students Association
- Bridge Program (offered through Upward Bound)
- Chemistry Teaching Assistants / Research Assistants

- Dentistry
- Early Start
- Foundation for Understanding through Students (“FUITS”)
- Gear Up
- Graduate School
- Keys to Success Fair
- Landscape Architecture
- Marine Affairs
- Medex Northwest Physician Assistant Program
- Minority Science and Engineering Program (MSEP)
- Music Teaching Assistants
- Pierce College (Community College)
- Prosthetics-Orthotics
- Women’s Center



Outreach also hosts a Quarterly Advisory Board meeting with the goal of getting important information out to advisors that they can then pass on to students. All of this has contributed to making SFS contacts with students smoother and more productive. Prior to the establishment of the Outreach unit, there was no unified protocol for information sharing with students and departments. The members of this tiny unit – Diane Cooley, the Outreach manager, and Kyra Worrell and Frannie Gladney, both Advisors,—have worked hard to change the way we provide student services and on building the Outreach program from the ground up. To that end, they were awarded a TOPS Award on November 14, 2003. Outreach is now offering “Managing the Maze” and “Money 101” to new students that will be starting Winter Quarter. They are continually looking at ways to improve the process of getting that information out to students and other members of the UW community. And now that other FM departments are looking to include outreach as part of their strategic plans for the future, SFS Outreach is looking forward to sharing ideas and information and helping other FM departments continue to grow and expand.

A Toast to Toastmasters

by *Cathy Billings*

The Financial Management Toastmasters club is celebrating its first six months of existence and we want to share with FM some of our accomplishments and some of our thoughts about what the club means to us.

We all know that public speaking skills are important and that being able to express ourselves makes us more confident and empowers us in the workplace, but for most people speaking in front of a group is the last thing on earth they want to do! Public speaking scares us and makes us anxious; I think that most of the current members would agree that they felt that way six months ago, but we've come a long way since then! Just look at some of the things members have to say about their Toastmasters experience:

"Joining the club was one of the best decisions I have ever made. I have gone from someone who would totally avoid speaking in public to someone who is a lot more confident and has given three speeches. I now am not worried about being called on in meetings or on teams to give my opinion."
Teresa Crisostomo, Travel

"I have rediscovered myself in terms of expressing myself freely. I have become a better listener. Of all the self-improvement opportunit[ies] given to Financial Management employees, nothing superce[des] Toastmasters."
Agnes Acholonu, Payables Administration

"The experience has met and even exceeded my expectations. The most important thing I learned is how to say just the significant things given a certain period of time [and] to convey to the audience the main idea that you want

them to understand. Toastmasters has boosted my self-confidence over the last six months."
Mai Lin Chua, SFS

What is it that really makes our club special? I think everyone would agree that it is the people! Whether speeches are humorous or serious, we always learn something new about each other, and every week we look forward to hearing what our co-workers have to say. One member sums it up by saying, "Everyone is so sincere when delivering speeches, [it] has made me feel that Toastmasters is my second home." The friendship and trust that has grown between members is what makes the FM Toastmasters Club an ideal environment in which to practice speaking in front of a group. Members have many good things to say about the support and encouragement that they receive from their peers:

"The best part is the support you get from the members during the meeting, and to see that we're all at very different levels and we all have our struggles."

Susie Rodriguez, Travel

"The atmosphere is great for practicing the skills; the group is so fun, friendly, and diverse."
Amy Liu, GCA

Toastmasters has really made a difference in our lives. Some of us have given just one speech; some have given seven, but we are all on our way to becoming confident public speakers. If you want to improve your speaking skills and think Toastmasters might be just the thing for you, or if you are just curious, please drop in to a meeting to see what the club is like—we guarantee that you will enjoy hearing your co-workers' speeches!

Meeting Day/Time: Every Tuesday, 12-1 p.m.

Place: Room 170, Schmitz Hall

Questions? Interested in becoming a member? Con-



tact membership officer Cathy Billings at 6-2578 or cathyb@u.washington.edu, or speak to one of your FM Toastmaster Club member co-workers:

Financial Services: Karem Martinez

GCA: Gwendolyn Darden, Amy Liu

Payables: Agnes Acholonu, Ashley Chambers, Pramilla Chand (Secretary), Shawn Williams (Sergeant at Arms)

Payroll: Denise Murillo

SFS: Diane Cooley (Vice President for Public Relations), Norm Englund, Kyra Worrell, Mai Lin Chua, Nancy Hurja

Travel Office: Susie Rodriguez, Teresa Crisostomo (Treasurer)

Treasury: Cathy Billings, Laura Lai, Ping Tan

You can also visit the Toastmasters International Website for more information about the organization: <http://www.toastmasters.org/>

STAY TUNED!

Look for “Toastmasters Tips” and club updates starting in the spring issue of *New Directions*. “Toastmasters Tips” will provide helpful suggestions on how to be a better and more confident speaker.

KUDOS

Kudos

Given to FM colleagues by folks from outside the division

Compiled by Randi Adair

Charles Bennett and the SLAP Team, Financial Accounting: “Great work by Charles and the entire team...another obsolete system bites the dust! Thanks for taking the initiative to make these improvements.” *Weldon Ihrig, Executive Vice President.*

Financial Accounting: “I (and others at KPMG) want to offer our congratulations to all on your team for [your recent TOPS Award]. It is extremely well deserved to say the least, and it is great to see that you got recognition for your efforts at the larger University campus level. Great job!! And, again, congratulations from all of us!!!” *Anne Nelson, KPMG.*

Grant and Contract Accounting (regarding a tour that administrative staff in the Biology Department took of the GCA office): “It was a very positive experience for us, and a real eye opener...I think every department should be required to have the tour and to see how hard the central departments work—it’s very evident from that brief interaction.” *Susie Hollingsworth, Biology.*

Heidi Anderson, Student Fiscal Services (regarding advice that Heidi provided on a student loan): “Heidi Anderson phoned me shortly after I requested information regarding deferment. She took time to discuss how it would work with my particular circumstances. The paperwork was mailed to me right away and Ms. Anderson also sent notice of my acceptance

without delay. As you might imagine, it was a relief to have this completed and I was grateful for the smooth and timely processing. It’s nice to know that no matter how hectic things might be, I can count on good customer assistance.” *A former UW student.*

John Cady, Grant and Contract Accounting: “In my 29 years at the UW I don’t believe I have worked with another person in the accounting department who has provided the level of service that John provides to us—and there have been some who do a really good job. We always seem to get our reports to him with days and hours to spare. It doesn’t matter—he gets them done. He imparts information to us that is extremely helpful and is, at all times, extremely patient and courteous. Several of my staff work with him on reports and in at least one case, he has gone far beyond what might be expected of him to assist with these submissions. We think he’s great and a pleasure to work with.” *Karen McMasters, General Internal Medicine.*

Kate Riley and Frank Montgomery: “Thanks so much for making the long trek to Ellensburg and doing a great job presenting FM’s performance measurements to the internal auditors. You made a great impression.” *Maureen Rhea, Director of Audits.*

LiChang Wong and Student Fiscal Services: “Thanks so much for your help [in resolving my son’s tuition issue]. Of all the offices we have dealt with to date at UW, you are by far the fastest and most accurate. I’m impressed!” *Den Fusso, parent of a UW student who was assisted by SFS.*

LiChang Wong, Student Fiscal Services: Li received the following plaque from the Army ROTC program: “This certificate of appreciation is presented to Li-Chang Wong in recognition of your support to the University of Washington Department Of Military Science, for your dedication and assistance with scholarship processing.” *Presented by Lieutenant Colonel, Paul J. Wood, US Army.*

Lili Gebrenegus, Grant and Contract Accounting: “I would like to thank one of your staff, Lili Gebrenegus, for the excellent work she did to resolve a budget error for our department. She is always helpful and always willing to educate our department regarding budget problems. We are so lucky to have her in GCA to work with!” *Teresa Lee, Center for AIDS and STDs.*

Linda Braziel and the Payroll Office: “A big THANK YOU for your willingness to help us out by producing hand drawn checks to the 40 graduate students impacted by [a deduction problem] on today’s check. I know that your willingness to process these checks will go a long way to reassuring the students...and will therefore keep this from becoming a bigger issue. We very much appreciate it!” *Kathleen Dwyer, Director of Benefits.*

Lisa Scheyer and the OPUS Client Service and Training Team, Payroll: “I wanted to pass along my compliments [to your team]! After being peripherally involved with USER/OPUS for years, I finally decided it was time to see how it actually worked. A simple email to your office resulted in a prompt response from Lisa and an offer to come out to provide an overview. We had that training today, and I felt it was extremely helpful and informative. Lisa did a wonderful job in taking us through the various screens and answering our questions. It’s no wonder that OPUS has been so successfully received by the campus.” *William Ferris, Office of the Executive Vice President.*

New Accounts, Grant and Contract Accounting (regarding a new policy of emailing departments when their new budget has been set up): “These email notices are REALLY helpful.” *Joan M. Bodey, Aquatic and Fishery Sciences.*

Payables Administration: “Thank you so much for all of your help. Everyone in Payables is always so helpful – I really appreciate it.” *Leann Dawson, UWMC Accounting.*

Ping Tan, Treasury Office: “The response to the news of the new professorship reports that Ping is doing has been very positive. We think the report is [very] useful.” *Connie Kravas, Development Office.*

Procurement Card Team, Financial Services: “The Procard and the careful procedures for its use are proving very convenient, efficient and fiscally responsible. The planning and training ahead of time was worth the effort.” *JoAnne Sether Menard, Psychiatry & Behavioral Sciences.*

Randall Lewis, Treasury Office: “Whenever I send Randy proposed changes or a new deal to complete, he does it lighting fast and always with a view to facilitating the transaction. He is very customer service oriented and looks out for UW’s best interests. Thanks, Randy and the Treasury team!” *Gail Y. Herman, Office of Technology Licensing.*

Ruchi Aggarwal, Management Accounting and Analysis: “I just wanted to drop you a note regarding Ruchi Aggarwal and let you know that she has been delight to work with on some long standing issues. We have recently had a change of service which has caused these issues to “heat up,” and Ruchi has been particularly helpful in this regard. In what has been a frustrating “crisis” situation, Ruchi has maintained her calm, poise and professionalism. Nan and I are particularly grateful for that and for her clear expertise in this area. She’s a great asset, as I’m sure you know!” *Betsy Zickler, Harborview Medical Center.*

Teresa Crisostomo, Travel: “I would like to thank you for the expeditious processing of [a rush TEV]. I also appreciate your following up the processing of the hand drawn check from your Office all the way to A/P. Thanks again for all the help you have extended our Office.” *Gloria Escano, Office of Intellectual Property and Technology Transfer.*

Thanh Nguyen, Payables Administration: “I just wanted to let you know that I really appreciate the job that Thanh Nguyen does for Payables. Thanh is always very quick at processing payments that need to get out before our budget closes and stopping

payments on those invoices that need revisions. I'm always happy when Thanh answers the phone at Payables because I know that my request will be taken care of in an accurate and efficient manner." *Maggie Connor, National Alzheimer's Coordinating Center.*

V'ella Warren, Vice President, Financial Management: "Thanks for voicing your articulate and persuasive perspective on the role of the USER Project yesterday. Your ability to cut through things and speak

about what's important to this place is very valuable. I've enjoyed reading of your organization's recent accomplishments. It occurred to me that despite the sense that as an institution we have become almost too heavy to move or change, that your organization is still moving and changing. Congrats to you for being a leader during these times! And, thank you." *Patricia Woehrlin, Office of the Executive Vice President.*

RQT/AWARDS

Recognition Roundup

by Zach Luther

TOPS

Cash Transmittal Team – Peggy Fitzwater (SFS), Paige Hamlin (SFS), Tess Domingo-Herrera (SFS), and Evelyn Jagoring (Financial Accounting) were awarded with a TOPS on November 7, 2003 for their work on modifying the Cash Transmittal process. Formerly, CTs had to be generated by a department, sent to SFS for processing, sent to Keydisk for entry, and then were filed in Financial Accounting. The team decided to use the bank's records instead of going through Keydisk and SFS, thus saving significant time and effort. By reducing the number of hands touching the CTs, the possibility for error was reduced. The new process is currently being used by about 20 departments, with more on the way.

SFS Outreach—Diane Cooley (SFS), Kyra Worrell (SFS), and Frannie Gladney (SFS) were presented with a TOPS award on November 13, 2003. They were nominated for this award because of their work in presenting information about Student Fiscal Services and the message of fiscal responsibility to campus departments, students and parents. They later began hosting training classes, including the popular "Managing the Maze." Their contributions to campus and FM make them very deserving of this award.

EXPRESS

SFS – 10/15/03

GCA – 10/16/03

RQT Update

by Zach Luther

The current Recognition Quality Team is moving into the second half of its term. We are continuing to work on projects already started, and we are initiating some new ideas for the six months ahead. The premiere of the revamped Person-to-Person gathering was a big success, and the second installment is coming up on January 28th. Harlan Patterson, Vice Provost of Planning & Budgeting will be the guest speaker. We're hoping for another great turnout to hear the speaker, have a free lunch and get to know some of your Financial Management co-workers.

Work is continuing on the RQT dashboard, an effort that will produce a number of useful measurements the team can use to compare past and current performance. The dashboard will also help us maintain more efficient processes in the future. We have been getting advice from experienced dashboard developers, and we are currently looking through our old award records for data and to find any trends. It is our goal to use the data to identify problem areas—areas where process slowdown occurs—and come up with creative solutions to these known problems.

Through November 2003, 120 Bravo awards had been given out since the program's inception in June. Recently, the RQT has begun offering a new option for the Bravo award: Starbucks gift cards! This is a nice treat for the coffee lover who goes the extra mile. In addition, the Bravo will still be available with University Bookstore, University Village and Red Robin gift cards.

These and other projects are all part of the RQT's effort to keep Financial Management a supportive and enjoyable place to work. We hope you all have reason to use the RQT to help recognize and reward

others for their effort and dedication. On behalf of the team, have a happy New Year!

For complete information about the RQT's activities and projects, check our website at <http://www.washington.edu/admin/finmgmt/qi/rqt>.

Recognition Just Got a Whole Lot Easier

by Zach Luther

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

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

Our first target was the TOPS form, a single page with only vague instructions vis-à-vis going about its completion. From that single page, we extrapolated a number of questions the nominator should consider, to help guide her through the process. We phrased and laid out these questions in a manner that will move the nominator through the form, from question to question, to not only help the nominator know

what to write about, but also to help her think about the nomination and whether the TOPS is the right award for the job. Instead of staring down a blank page when the urge strikes her to nominate, the nominator can simply answer the leading questions designed to guide her through the form.

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

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

CALENDAR

Employee Development Workshop

Ethnic Cultural Center (Asian Room)
February 3rd & 11th (2:00–4:30 both days)

Art and Science of Giving and Receiving Feedback

142 Gerberding
February 9th (12:30–4:30)
Contact Rae Ann Laubenstein at raeamnl@u.washington.edu for details.

New Employee Recognition Awareness Training

Sometime in February
Contact Diane Cooley at dianec@u.washington.edu for details.