Thank you to all who participated in the Leadership Quality Awareness Sessions in December. Ninety percent of the Financial Management staff attended the two-hour sessions and the overall feedback was positive. In my combined roles of Champion and program coordinator, I had the unique opportunity of being present at all sessions. Through my conversations with Financial Management staff, both in the sessions and afterward, I heard varied comments including “it was marvelous,” “it was great to see the progress from the focus groups to this statement,” “I liked the small group discussions the best, and especially mixing people up from throughout the organization.” Based on early constructive feedback, the EIT presenters modified the program to allow more group discussion, increasing the time spent in small groups from 20 minutes to 45 minutes. It became clear to the EIT that small group discussions were of greater value than the formal presentation!

Some comments gave us pause to think. We heard from some staff who thought it unnecessary to first identify and then discuss the qualities and behaviors of effective leaders in Financial Management. These qualities were ones that any good leader should possess. Others thought that their leaders already possessed the traits, while others still suggested that their leaders needed improvement. As we proceed with the organization-wide leadership assessment, we expect to find similar varying views.

The EIT and I welcome any additional feedback on your experience at the Leadership Qualities Awareness Sessions. We are interested in knowing if the content of the sessions is being discussed in your departments, if the approach taken is working for you or if you found yourself motivated to develop your skills as a result of the sessions.

Staff Qualities Focus Group

During January, the development of a Staff Qualities statement will begin.

Using a similar process to the one used for the Leadership Qualities, four randomly selected focus groups (including approximately ten staff members with Leadership focus group experience) will consider the question, “If I could build the ideal co-worker, what qualities would that person have?” Training and Development, led by Karen Crowder, acting manager, will coordinate and facilitate these groups. If you are not randomly selected, but want to participate in case of vacancies or to get on the list of substitutes, please contact Training and Development at 3-1957. Names will be drawn from this list to participate.
**SFS Customer Service Vision**

*Sally Schwartz*

The 1994 Quality Focus for Financial Management includes three areas: Customer Service, Major Processes and Leadership. As part of the customer initiative in SFS (Student Fiscal Services), the leaders group started with the well-worn statement, "...to meet and exceed customer expectations..." Now, what does that REALLY mean?

After much discussion, the leaders group finally decided that there were three primary elements to customer service: training employees on processes and procedures, talking to our customers on a regular basis and involving our process partners in improvements. These key elements were the basis for the final customer service vision:

**We will expand our ability to serve our customers through increasing our knowledge of student services processes and our shared understanding of their needs.**

**We will engage our customers to determine what is important to them and how well we are doing.**

**We will work with process partners in our efforts to improve customer service and the Schmitz Hall image.**

We hope that this statement can provide a common vision for all three offices in SFS, a common definition of customer service, a ranking of student expectations and an understanding of processes across all three offices.

It will also serve as a tool to guide development and provide a standard to evaluate future and current endeavors.

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**Payroll's PACER's**

*The PACERS*

Payroll's support and report team, the PACERS, chose their name because of the workload and the SPEED in which they work. Gerry Acuesta, Betty Light, Cathy Stewart, and Linda Braziel proclaim that there is NEVER a dull moment. This team's responsibilities include receiving, properly sorting, distributing and filing all incoming payroll documents (12,000 pieces per month). Annually, the PACERS also receive 100,000 pages of salary certification reports from campus, and these must be maintained so that requests for information can be answered. In addition, the PACERS are responsible for maintaining the filing systems for all documents associated with the Payroll Office: individual employee files, microfiche files and record center files (the retention for record center files is 50 years). PACERS are also responsible for support functions such as preparing calendars for campus, forms management and control, purchasing, "signing" payroll checks, producing phone and e-mail listings, and whatever else you may think of that relates to support functions.

The team is currently involved in the solution phase of problem solving and we are working on ways to streamline and to keep the payroll documents process current. We had no problem proving the existence of the problem. However, temptation reared its ugly head as we faced staying away from offering solutions during each problem solving step: problem identification/definition, investigation, and analysis (sound familiar?). With the help of our wonderful facilitator, Monica Banks from the Receivables Collection Office, we're where we want to be.

And, we have something exciting to talk about! During 1994, we named 30+ accomplishments to date. These accomplishments include improving Payroll’s distribution of checks on payday so that campus representatives' time to wait in line decreased from 15 minutes to 3 minutes. Thanks to V' Ella and our sponsor, Patti Kimpton, we had the opportunity to take four training modules from Training and Development: communications, consensus, conflict and teambuilding. We were fortunate to have a great training leader (we'll give you a hint). The person no longer works in Training and Development and now works for Financial Management. These modules were fantastic! They enabled our team to come together and work as a highly successful work team.

We won't list all of our accomplishments now—we need to run off and make some kind of improvement somewhere.

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**PROBLEMS OFTEN LOOK OVERWHELMING AT FIRST.**

**THE SECRET IS TO BREAK PROBLEMS INTO SMALL, MANAGEABLE CHUNKS. IF YOU REALLY WITH THOSE, YOU'RE DONE BEFORE YOU KNOW IT.**

**FOR EXAMPLE, I'M SUPPOSED TO READ THIS ENTIRE HISTORY CHAPTER. IT LOOKS IMPOSSIBLE, SO I BREAK THE PROBLEM DOWN.**

**YOU FOCUS ON READING THE FIRST SECTION?**

**I ASK MYSELF, "DO I EVEN CARE?"**
Q: When I am asked to attend a FM-wide event, how is my supervisor supposed to know about it?
A: As with any commitment that takes you away from your regular job duties, you need to talk with your supervisor about it so you can negotiate for coverage and any reshuffling of workload. In some cases, the supervisor may know about it already, but in some cases s/he may not. Some information flows from the EIT to the supervisors, but not all.

Q: What if my supervisor won’t let me attend?
A: In most cases you, your supervisor and work team should be able to figure out a way you can attend. If many people in the same unit are asked to participate at the same time, however, some may not be able to go if preserving customer service is a problem or if workload is unusually heavy. If you can not attend a particular event, you should make arrangements to go the next time.

Q: What does the Champion do?
A: The Champion has many varied activities all aimed at encouraging the organization to keep up the efforts toward quality improvement. Her daily activities may include facilitating teams, assisting with departmental planning, researching and presenting new ideas or approaches to improvement training, editing Directions, helping with conflict resolution, visiting units and helping out, and coaching leaders.

Q: If I want to talk personally with the Champion, how do I do that?
A: You can reach the Champion in many ways. Ruth can be called at 5-9838, e-mailed at rolson, stopped while visiting in a department or at a meeting, or through written note. Although she is not often in her office, Ruth will return calls or e-mails promptly and set up a meeting in person or on the telephone.

Facilitators Roundtable
Cindy Gregovich

The facilitators roundtable was held November 28, 1994. An ice breaker, small group discussion, and a presentation on team building by Ruth Olson were part of the session.

The presentation reminded us all that team building is an ongoing process. New ideas need to be brought to the team meetings to make them interesting and to keep the members focused. Among the suggestions were: group discussions, break into small groups or pairs, individual/team assessments, simulations, group exercises, ice breakers, lectures, role playing, bring in a different facilitator or show videos. The session was designed to assess the needs of facilitators and to see how the Inciters (the training and facilitation team) can help them meet their teams’ needs. Good feedback was supplied and will be used to plan future roundtables.

If you were unable to attend and would like to offer your suggestions, please e-mail an Inciter Team member: (Linda Braziel: lbraziel, Jane Wiseman: wisej, Cindy Gregovich: cingreg or Ruth Olson: rolson).

Thank you, facilitators, for your thoughts, ideas, and the time you devoted toward making Quality Improvement a success.

Corrigendum
The article entitled Open Team Revisited, featured in the last issue of Directions, was incorrectly attributed.

The authors should have been listed as: Karen Agy, Jena Andershonis, Barry Cross, Dee Neal, Tram Nguyen, Lynn Restrepo, Nguyet Sin and Catherine Wicks.
Announcements

• On January 14th, the ServQual Network will feature Gary Jusela, Boeing’s corporate director of executive education and development, who will speak on “Creating Systems Where People Can Thrive” which will focus on organization and leadership dimensions of high quality workplaces. This free event is offered monthly for Washington State employees and agencies working on total quality management. Contact Naomi Nobles (3-4990 or e-mail at nmn) to reserve a ride in the van.

• A variety of TQM resource materials are available on the 2nd floor of the Administration Building in Financial Management. All FM staff are encouraged to utilize or check-out the many articles, books, and videos on topics of process improvement, leadership, measurement, and team building. In addition, a complete suggested resource list is available courtesy of the CQI-L electronic mail network. Please contact Ruth Lindgren, Naomi Nobles, or Ruth Olson for more information.

• The Inciters (otherwise known as the Training and Facilitation Team) is currently on hiatus until a structure for training is better defined. In the meantime, if you have training or facilitation questions, please contact either Linda Braziel (3-5177, lbraziel), Jane Wiseman (3-8282, wisej), Cindy Gregovich (3-7560, cingreg), or Ruth Olson (5-9838, rolson). Upcoming sessions on Awareness, Problem Solving, and Recognition are being planned beginning in January.

A Sincere CFD Thank You!

Jackie Levine

Mike Bryant, realizing these folks are serious about the pie, makes a final offer.

As of this writing, Financial Management is number 1 in participation for the 1994 UW Combined Fund Drive (CFD) with 85% of us participating. This is a 19% increase from 1993’s 66% and we also had a 21% increase in dollars donated. That is quite an accomplishment and I believe most of our success is attributable to our training and experience with QI and the generosity of the staff of Financial Management.

I would like to share with you how this all came about. First a call went out to the division for volunteers for the position of overall coordinator and for departmental representatives. Those replies came in very quickly. I volunteered to be the coordinator and the following people volunteered to be their department’s representatives: Marie Hurlbut—Accounting Operations, Mark Landis—Student Loans, Lolita Hidalgo and Hyang Ja Kwon—Accounts Payable, Jacki Wrigg—Grant & Contract Accounting, Joni McDonald and Edna Ramos—Payroll, Stuart Eng—Student Accounts, Gordon Hammond—Financial Accounting, Ruth Lindgren—Controller and Investments, and Linda Sexauer—Receivables Collection. Some of these people volunteered in past campaigns, which was a big help to those of us new to the campaign.

Once it was determined who the reps were, we got together to meet each other and our CFD loaned executive, Andrew McCullough from US West. We began preliminary discussions and arranged to meet after we all attended the CFD leadership session.

Continued on Page 6
The Recognition Express, the Recognition Team's latest AD-venture, is off to a flying start!

The first station stop was at the Payroll Office on October 4 ... a 2:00 P.M. "cake and cola" party brought by four Recognition Team members. The response from Payroll staffers was very enthusiastic. They enjoyed the party atmosphere and particularly loved the colorful banners, decorated with witty and affectionate sayings appropriate to Payroll. The consensus was, "It made us feel really special!"

RQT's second enterprise was a safari to Student Loans on October 5. Ghan Sachdeva, RQT representative from this department, was particularly excited to see his colleagues get recognized. "From their comments and smiling faces, I can easily guess that everybody liked it," he said. Other comments overheard on this occasion were: "Great Idea, the food is always welcome, but more important was the recognition for a good job," "I think RQT Express is a worthwhile program." The entire staff appreciated being recognized as a WHOLE, and all at one time.

The Recognition Express took their train to Student Accounts Office on October 14, where they and their goodies and banners were again greeted with delight and surprise. Everyone liked the banners; the morale-boosting message had even more impact because it was tuition-deadline day, so many of their customers also appreciated the "specialness" of the Student Accounts staff and their being recognized in such a way!

Financial Accounting was probably the most surprised group. When we arrived on November 16 with our goodies and balloons and banners, they had assembled in the GAO conference room, and were looking very serious indeed. They were expecting a budget meeting; but instead ... they got RECOGNITION. Jon Garcia expressed it as "uplifting, NOT a calorie-counting occasion." Others also remarked on how surprised they were, and what a lot of fun they had. One person also remarked that, because of the nature of their work, they have few occasions to be together as a group, so this one was especially nice!

The Recognition Team has discovered again in a personal way that recognition, like many other rewarding experiences, works both ways. When you give recognition, the pleasure is indeed a shared one!

The Recognition Quality Team looks back on 1994 as a year of progress and change. We would be remiss if we neglected this opportunity to express our sincere appreciation to Jackie Levine for the outstanding contributions she made to the RQT while serving as its leader. Jackie, you have provided an example of enthusiasm and commitment which is an inspiration to the entire Financial Management organization. Thank you for everything. Peggy Fitzwater, who followed Jackie as leader, is well on the way to establishing herself as a worthy successor. Keep up the good work, Peggy!

During 1994, four AIM awardees were honored: Fred Bailey, Gary Comfort, Marie Hurlbut and Dick Simmons. In addition, three individual TOPS awards were made: Joanne Bedier, Brenda Grayson and Hien Tran.

Also, the Sweet Peas Team (Leena Amaraweera, Doris Coxon, Susan Elvert, Ken Haines, Pam Jacobs and Frances Wilson) and the group responsible for the NACUBO award proposal (Doug Breckel, Michael Fero, Judy Fingar, Ken Haines and V'Ella Warren) were recognized for their contributions with TOPS awards.

Thanks to everyone for a great year —let's do it again in '95.
CFD Thank You (Cont’d)

We were all invited to a CFD Leadership Session for an information briefing. We learned about the campaign, some of the agencies that benefit from our contributions, and some of the activities that worked for other areas.

Since we all had training and experience with QI principles, it was easier for us. We immediately called ourselves the CFD Team. We set a reasonable measurable goal for the division and discussed ways to help us reach that goal. We brainstormed ideas for disseminating division-wide information and planned for a celebration event. We massaged those ideas into a very informative day of speakers and videos for the whole division to learn about some of the charities in the Combined Fund. We then planned a celebration to say thank you to our coworkers for their generosity this year and in past years. The pie-in-the-face part of the celebration was a little uncomfortable for some so we worked on that idea until there was consensus that this could be fun.

As the campaign came to a close, we knew we would exceed our goal of a 5% increase in participation for the division (because of the tremendous increase from Accounts Payable and Student Accounts, our overall increase is 19%). Our last task as a team was the celebration on Nov 11. We had a very short time span to be in the room we rented in the HUB. Only because of team effort (and help from Mary Brokaw, Nabil Girgis, and Henry Tan) were we able to transport balloons, food, and prizes and set up the room by 12 noon. This was the first time that we treated the campaign as a division-wide event and I think that it worked very well. We all shared the things that needed to be addressed for this event. The best compliment I heard was, “This was your first event of this kind? I thought that this had been done before.”

If this event happens next year, we will need to think about a guest pie receiver. Mike Bryant told me not to even think about calling him next year. He won’t be taking any calls from me during the months of September or October.

Congratulations and thanks to all!

Where Are We Now? Survey Results

In the September issue of Directions we asked our readers to respond to the question, “With regard to Quality Improvement, where do you think you/your department/senior management is/are (Denial, Resistance, Exploration or Commitment) relative to workplace change?” The graphs below summarize your responses and are largely consistent with EIT views.
Several years ago, the Investments Office formalized its partnership efforts with a key supplier—The Northern Trust Company. This Chicago bank is the custodian for the University’s investment portfolios and an organization that embarked on its own quest for quality improvement in the early 1990s. In April 1993, five members of The Northern Trust representing various facets of the service relationship with the UW met with six members of the Investments Office staff in an information sharing and problem identification session. Among the issues identified was the need to develop process measures that would focus the supplier on areas of critical importance to the customer (i.e., us!).

Together the Investments Office and The Northern Trust decided upon a team name—the Pioneers. And we did feel as though we were charting new territory. Here in the Investments Office we were being asked by our supplier to identify our needs and quality standards in order for them to better serve us! The shoe was on the other foot but that did not make it any easier to answer the question. We even began to feel some sympathy for all those customers we had approached with similar questions only to be met with puzzled expressions and that annoyingly unhelpful response, “I’ll know it when I see it.”

We were the Customer … by definition, we were always right.

The ‘Blame’ and ‘Whine’ Factor

And still, we kept asking for everything and whining when “it” was not quite what we had in mind. No matter that we hadn’t really gotten around to defining just what “on time” and “accurate” really meant! We were, after all, The Customer! By definition we were always right! Besides, it was sometimes comforting to be able to roll our eyes, gaze meaningfully at each other and say “Guess who messed up AGAIN?”

The Quest for Perfection

It wasn’t exactly true that we didn’t know what we wanted. We wanted everything. On time. Accurate. And in an easily accessible form. End of discussion. And so we were perennially dissatisfied. The Northern Trust responded by sending us everything they had—boxloads of reports on our investment managers every month. Sometimes they arrived later rather than sooner which gave us an excuse to whine a little. Sometimes the reports had dreadful errors embedded in them that gave us an excuse to whine a lot. To make matters worse, we kept “changing the process”—hiring new managers, firing others, and modifying our investment policies to allow for even more complexity in our investment portfolios. Turnover of key personnel servicing our account at The Northern Trust helped ensure our lives would stay interesting. The misery just kept compounding.

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The Pioneers’ Progress

In spite of ourselves, we were getting closer to our goal. Early in 1994 we completed our team charter. In it we clearly identified measurement as a primary objective. We held two more on-site working sessions with The Northern Trust in the first half of 1994 and by the end of the second session, we had defined an approach to measurement acceptable to both sides of the partnership. We did some back testing and implemented the measurement tool in July 1994. Now THIS was progress!

We learned many things along the way. First of all, it is impossible to measure “everything.” We had to think about the areas of supplier service that really made a difference in our ability to meet OUR customer needs. We had to PRIORITIZE. We then had to communicate our priorities to The Northern Trust in a way that would enable them to change their processes in order to better serve us. That meant our measure had to be well-defined, objective, and easy to understand.

By George, We’ve Got It!

The amazing thing is that it appears to be making a difference. A key report was reformatted to include helpful documentation on investment activity. This change resulted in process efficiencies at our end such as shortened internal reviews. Importantly, this improvement was instigated not by us but by The Northern Trust. Our expectations are not only being met, they are being exceeded! Even more encouraging, The Northern Trust is now focused in a way that enables prevention and/or correction of errors before information is passed on to us. An improvement? You bet!

Directions is published quarterly by the Office of Financial Management, University of Washington. For more information, please contact: Ruth Olson, Editor (545-9838) or rolson@u.washington.edu
Where Quality Emphasis Lies
Source: American Society for Quality Control and the Gallup Organization

There are formal quality programs in place at 58% of U.S. companies. A survey of the American Society for Quality Control and The Gallup Organization finds the current and future TQM priorities as follows:

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<th>Present</th>
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<td>Management commitment</td>
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<td>Customer focus</td>
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10 Tips to Insure A Quality Customer Driven Culture
Source: Pacific First Bank

1. Assess your present culture. (Attitudes, Values, Commitment)
2. Form your vision for Quality Service. (Mission, Philosophy, Values)
3. Develop your Team. (Shared responsibilities, leadership)
4. Establish a Commitment to Values. (Develop a passion for quality Service)
5. Develop a structure for continuous improvement. (Quality & Service)
6. Establish standards for performance. (behaviors that yield quality)
7. Develop a measurement and monitoring system.
8. Implement a recognition and reward system.
9. Evaluate results for continuous renewal
10. Refer back to step one.

Financial Management
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