FINANCIAL MANAGEMENT
UNIVERSITY of WASHINGTON
Finance & Facilities

Operational Performance Dashboard
March 2010
FY 2010 Quarter 3 (January - March 2010)
Final

Financial management Mission:

We help people who change the world through collaboration, consultation and financial stewardship.

Key processes include:

Bill & Collect Tuition
Collect and Distribute Mail
Design and Print Communication Pieces
Develop and Maintain Websites
Develop & Negotiate Indirect Cost Rates
Develop FM Staff
Disburse Financial Aid to Students
Manage Financial Recording
Manage Grants
Manage records retention and compliance
Information Reporting
Pay Bills
Pay People
Protect and promote the University Image
Purchase Goods & Services

Report Contact: Jeanne Semura, semurj@u.washington.edu
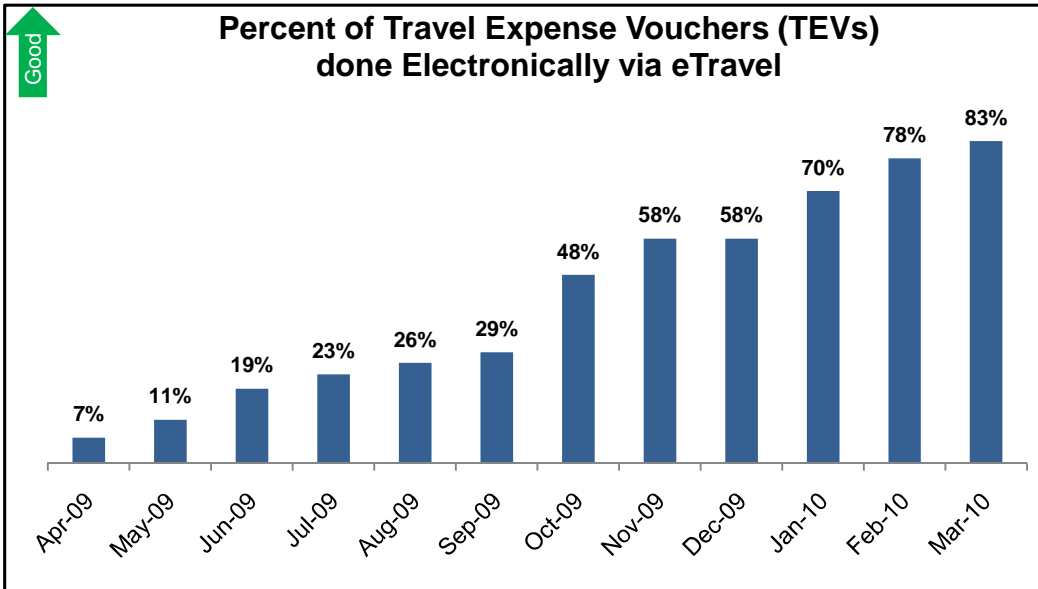
FINANCIAL MANAGEMENT

(A unit of Finance & Facilities)
Operational Performance Dashboard - FY 2010 Quarter 3 (January - March 2010)

Process	Measure	Current Output Measure	Target		Gap (Target-Output)	Process	Measure	Current Output Measure	Target		Gap (Target-Output)
CUSTOMER						**FINANCIAL**					
Pay Bills	Percent of travel expenses reimbursed within 5 days of receipt of TEV	96%	95%	↑	No Gap	Pay Bills	Percent of online invoices paid within 30 days of receipt in PA	94%	95%	↑	-1%
Manage Grants	Twelve month average of number of days to setup a new award (from receipt of award in OSP to notification to PI of budget number)	15 days	12 days	↓	2.8	Pay Bills	Reduction in Small Dollar PAS Transactions which should be going through eCommerce.	6,229	6,000	↓	229
Disburse Financial Aid	Percentage of Aid disbursed during the 1st week of a quarter.	79% 2009	85% Benchmark	↑	-6%	Manage Grants	Total uncollected cash for unbilled invoices & aged receivables (cumulative) – JDE	$50 million	$23 million	↓	$27.1
	Percent of students satisfied with SFS services.	88% Preliminary 2010	64% Benchmark	↑	No Gap	Bill & Collect Tuition	Percent of students in default on all long-term loans.	6.7% 2009	8.3%	↓	No Gap
Design and Print Comm. Pieces	Percent of clients who are satisfied with Creative + Communications	97%	85%	↑	No Gap	Indirect Cost Rates	Five year average of percent annual change in F&A Indirect Cost	3.3%	5.0%	↑	-1.7%
INTERNAL BUSINESS PROCESS						**LEARNING & GROWTH**					
Inc. online Trans.	Process online mailing, printing & copying	34%	26%	↑	No Gap	Develop Staff	Percent of staff highly satisfied with FM (top 2 ratings on scale)	68% 2009	69% Benchmark	↑	-1%
Manage Fin. Rec.	Percent of total count of inter-departmental billings entered in FAS more than 1 month & 1 day from current month	3%	1%	↓	2%		Percent of staff who agree that "the FM Diversity Initiative has made a positive impact in FM". (top 2 ratings on scale)	56% 2009	90%	↑	-34%
Inc. prod.	Productivity – Annual % change from previous year, using a 2008 base year (benchmark). - UNDER REVISION	5% FY09	5%	↑	No Gap		Percent of staff who state that "they are developing their skills as a knowledge worker" (top 2 ratings on scale)	73% 2009	90%	↑	-17%
Pay People	Number of outstanding I-9's	178	50	↓	127		Active Employee Development Plans (EDPs)	37%	75%	↑	-38%

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Pay Bills - Travel

Customer

Percent of Travel Expense Vouchers (TEVs) done Electronically via eTravel

Good

Month	Percent
Apr-09	7%
May-09	11%
Jun-09	19%
Jul-09	23%
Aug-09	26%
Sep-09	29%
Oct-09	48%
Nov-09	58%
Dec-09	58%
Jan-10	70%
Feb-10	78%
Mar-10	83%

Percent of Travel Expense Vouchers (TEV) Reimbursed Within 5 Days of Receipt in Travel Office*

Good

Percent of Total — Upper Control Limit = 99% — Lower Control Limit = 90%

*Based on a statistically valid sample of TEVs is taken on a monthly basis. The TEV is an accounting form used to document money spent on a trip.
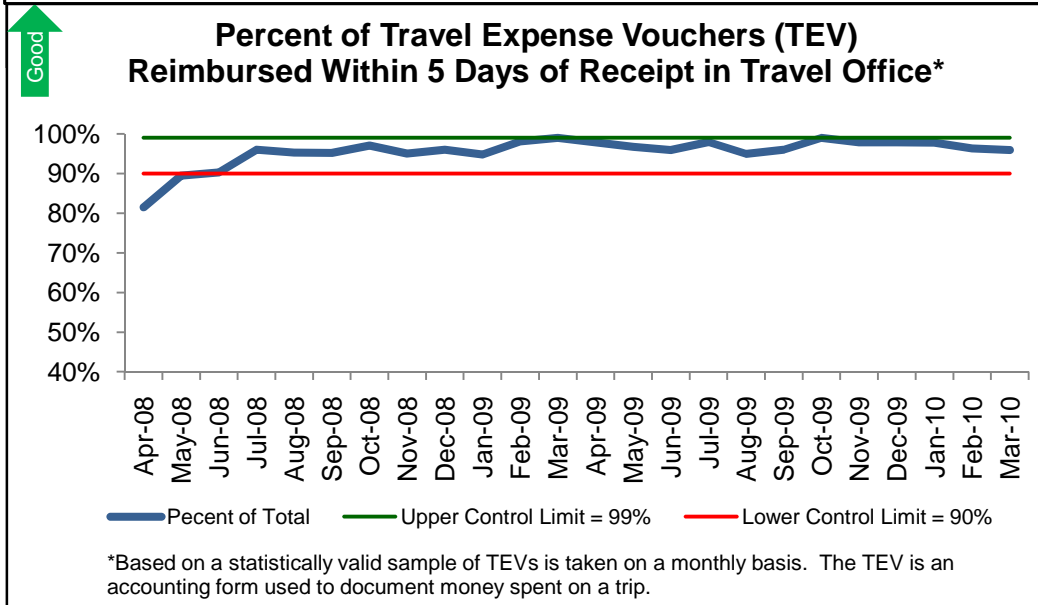
DEFINITION
The top graph quantifies the percent of total travel vouchers completed electronically through the new Ariba eTravel system. The bottom graph tracks paper vouchers. It shows the average number of working days between receipt of a TEV (Travel Expense Voucher) in the Travel Office and the check date.

ANALYSIS
The top chart tracks migration from manual to eTravel transactions. Since the April 2009 launch, eTravel usage has increased 83%. The Travel Office is training weekly to get more departments on-line. Paper TEV's are decreasing. The bottom chart tracks reimbursements within 5 days. Except for the drop in April 2008, this measure continues to be consistent. In March 1010, 96% were reimbursed within 5 days of receipt.
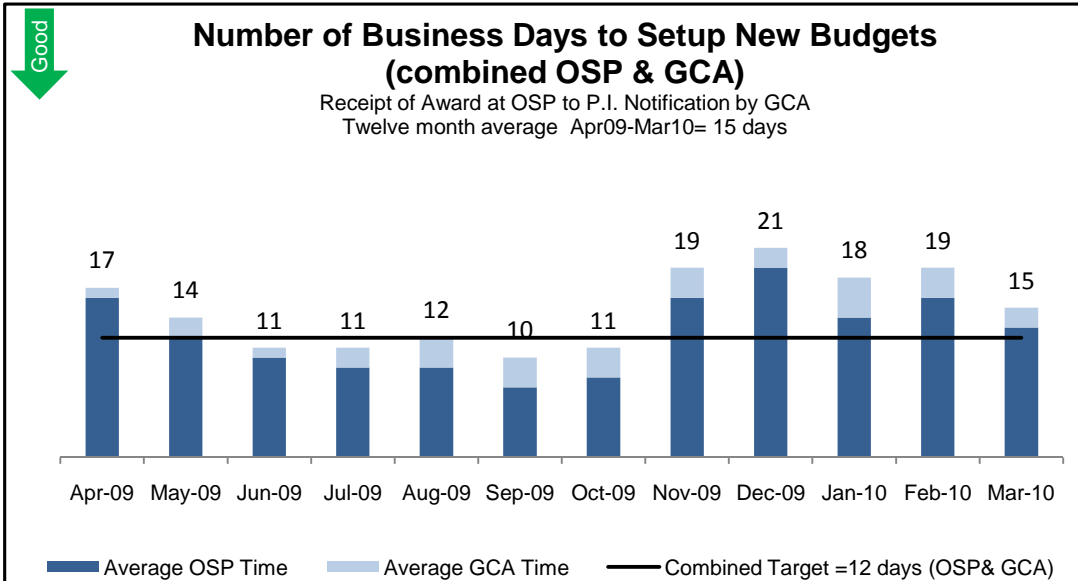
NEXT STEPS
Continue to train departments on eTravel; complete our planned rollout by June 15, 2010. We will also continue to measure the migration of TEV forms from paper to eTravel.

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Manage Grants (New Budget Setup) - GCA

Customer

Number of Business Days to Setup New Budgets (combined OSP & GCA)
Receipt of Award at OSP to P.I. Notification by GCA
Twelve month average Apr09-Mar10= 15 days

Good ↓

Month	Value
Apr-09	17
May-09	14
Jun-09	11
Jul-09	11
Aug-09	12
Sep-09	10
Oct-09	11
Nov-09	19
Dec-09	21
Jan-10	18
Feb-10	19
Mar-10	15

■ Average OSP Time   ■ Average GCA Time   — Combined Target =12 days (OSP& GCA)

Number of Business Days to Setup New Budgets in GCA Only
Receipt of Award at GCA to P.I. Notification by GCA

Good ↓

Month	Value
Apr-09	1
May-09	2
Jun-09	1
Jul-09	2
Aug-09	3
Sep-09	3
Oct-09	3
Nov-09	3
Dec-09	2
Jan-10	4
Feb-10	3
Mar-10	2

■ Average GCA Time   — GCA Target = 1 day

DEFINITION
The measure shows the average number of days to establish a new award in the UW Financial Systems. Twelve month average Apr09-Mar10 = 15 days.

ANALYSIS
The implementation of SERA (System for Electronic Research Accounting) in January 2009, reflects the coordination of efforts of GCA (Grant and Contract Accounting) and OSP (Office of Sponsored Programs) to automate sharing of information. Elimination of double manual entry and hardcopy paper trails helped to decrease award setup time . SERA's implementation supports the account set-up process that includes passage of data, specific award communication between OSP and GCA, and campus notification of account set-up completion.
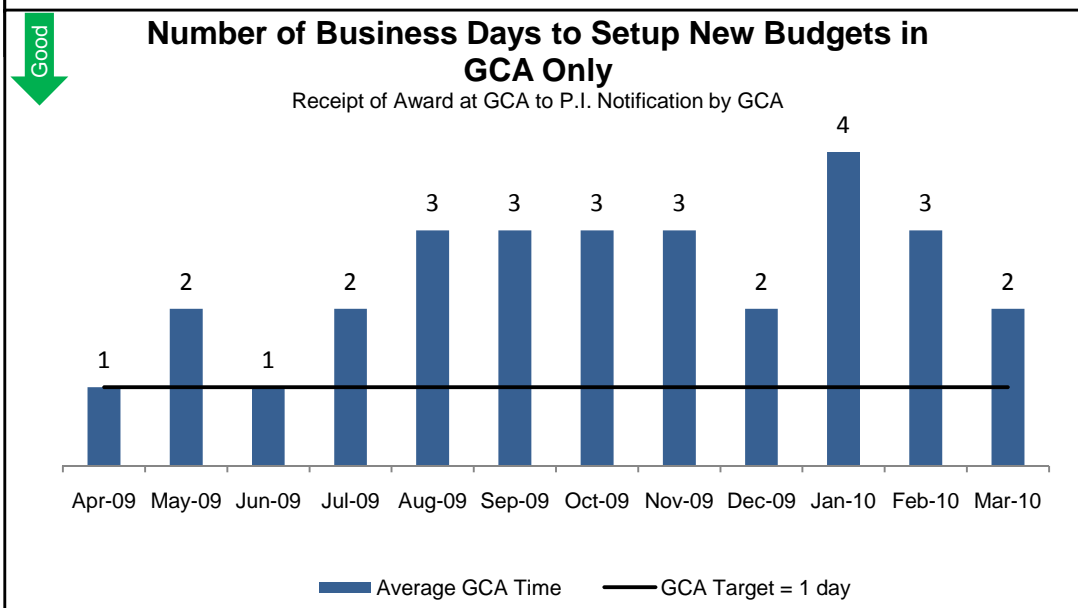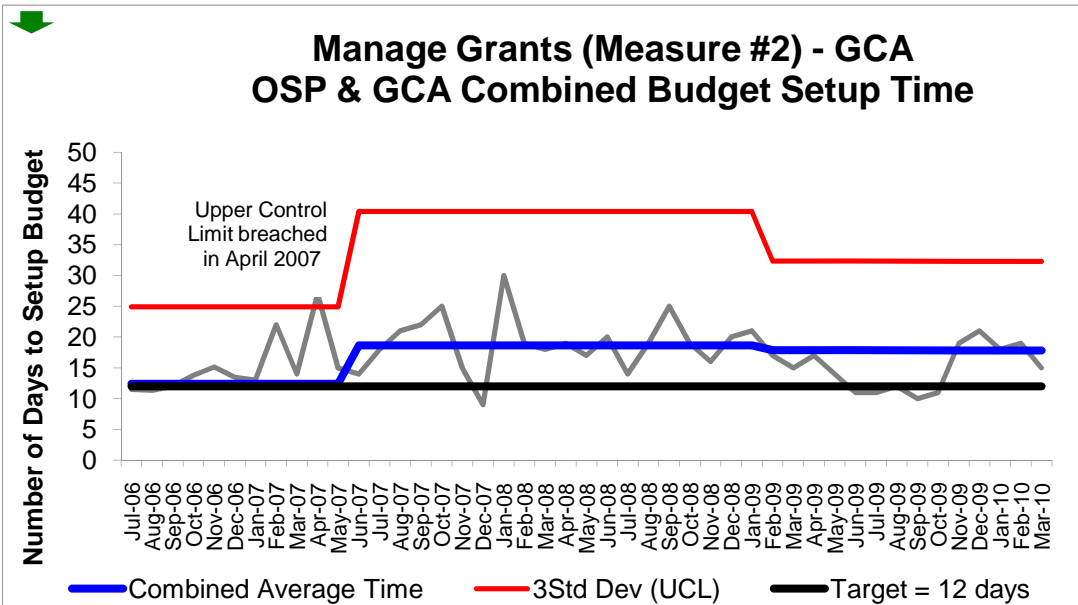
The average time to set up new budgets in GCA increased due to the influx of new awards the university received under the American Recovery and Reinvestment Act (ARRA). In addition, GCA has had three vacant positions for over three months.

NEXT STEPS
GCA will continue to work closely with OSP to maintain a stable output in the new budget set-up process. Continuous improvements will achieve desired efficiency and transparency between the two offices. Currently under discussion is the "bridge" between GCA and OSP where all award related info will be in electronic forms to eliminate most of the manual intervention.

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Manage Grants (New Budget Setup) - GCA

Customer

Manage Grants (Measure #2) - GCA
OSP & GCA Combined Budget Setup Time

Upper Control Limit breached in April 2007

Legend:
— Combined Average Time — 3Std Dev (UCL) — Target = 12 days

Y-axis: Number of Days to Setup Budget (0–50)
X-axis: Jul-06 through Mar-10

Manage Grants (Measure #2) - GCA
GCA Budget Setup Time

Legend:
— Average GCA Time — 3Std Dev (UCL) — Target = 1 day

Y-axis: Number of Days to Setup Budget (0–5)
X-axis: Jul-06 through Mar-10

DEFINITION
The average number of days to establish a new award in the UW Financial Systems. Twelve month average Apr09-Mar10 = 15 days.

ANALYSIS
The implementation of SERA (System for Electronic Research Accounting) in January 2009, reflects the coordinating efforts of GCA (Grant and Contract Accounting) and OSP (Office of Sponsored Programs) to automate sharing of information. Eliminating double manual entry and hardcopy paper trails helped decrease award setup time. SERA's implementation supporting the account set-up process that includes passage of data, specific award communication between OSP and GCA, and campus notification of account set-up completion.

April 2007: Upper control limit was breached with a measure of 27 (UCL=25). New control limits established to reflect the trend. In January 2009, data for New Budget Set Up was fully available with SERA. Adjustment to the control limits was made to reflect the decreasing trend of time needed to set up a new budget.
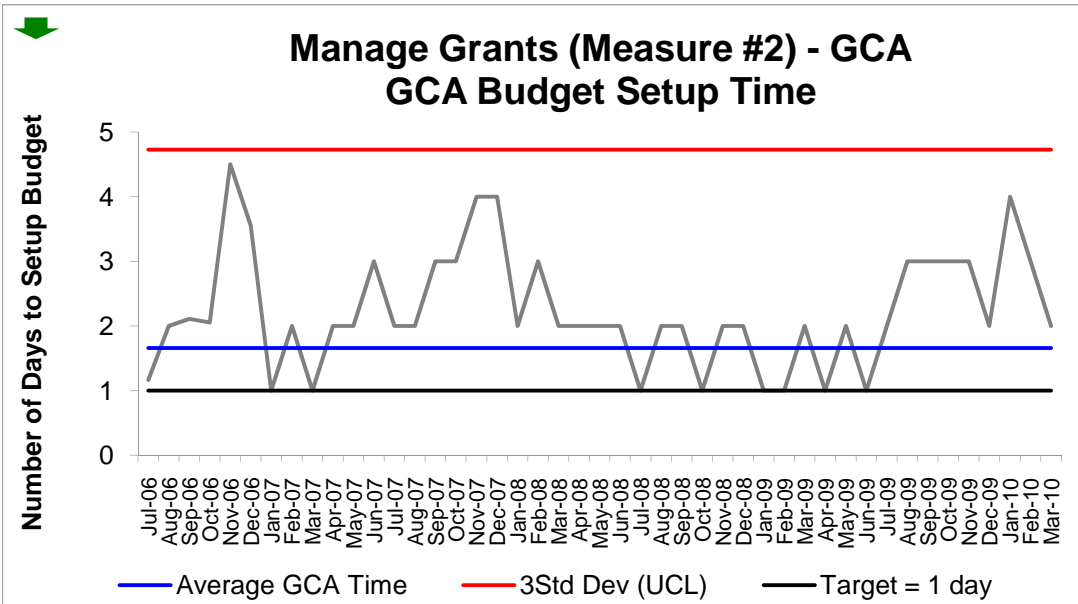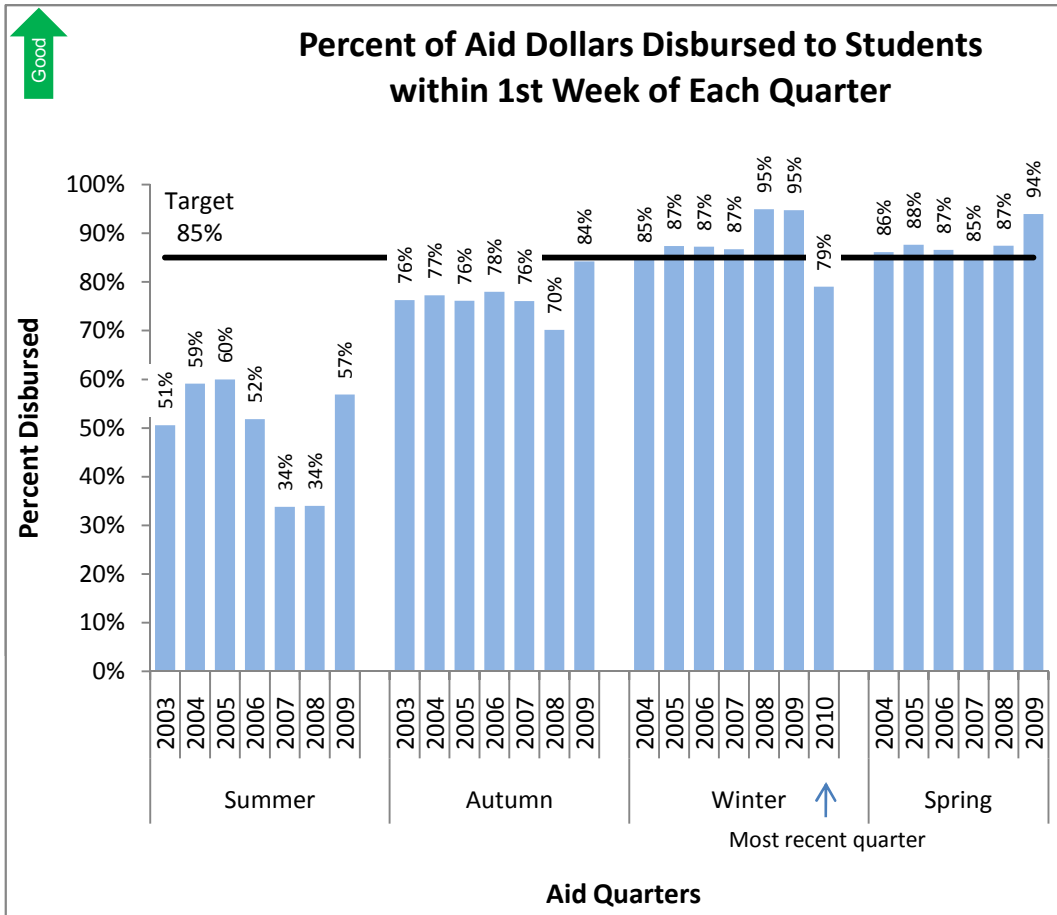
NEXT STEPS
Continuous improvements to the electronic account set-up process to achieve desired efficiency and transparency between OSP and GCA.

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Disburse Financial Aid - SFS

Customer

Percent of Aid Dollars Disbursed to Students within 1st Week of Each Quarter

Target 85%

Y-axis: Percent Disbursed (0% – 100%)

Summer: 2003: 51%, 2004: 59%, 2005: 60%, 2006: 52%, 2007: 34%, 2008: 34%, 2009: 57%

Autumn: 2003: 76%, 2004: 77%, 2005: 76%, 2006: 78%, 2007: 76%, 2008: 70%, 2009: 84%

Winter: 2004: 85%, 2005: 87%, 2006: 87%, 2007: 87%, 2008: 95%, 2009: 95%, 2010: 79%

Spring: 2004: 86%, 2005: 88%, 2006: 87%, 2007: 85%, 2008: 87%, 2009: 94%

Most recent quarter (Winter)

Aid Quarters

By Quarter	Summer	Autumn	Winter	Spring
Standard Deviation	11.18%	4.12%	5.60%	3.18%
Variance	1.25%	0.17%	0.31%	0.10%

Historical	
Standard Deviation	17.33%
Variance	3.00%

DEFINITION
Student Fiscal Services (SFS) is responsible for disbursing aid to students that originates both through UW sources (e.g., departmental scholarships, aid packages awarded through the Office of Student Financial Aid, as well as external sources (e.g., private scholarships, VA awards, etc.) The sooner we can process and release the funds to students, the sooner they can pay their educational expenses. SFS seeks to disburse as much aid as possible during the first week of each quarter.

ANALYSIS
SFS disbursed $174.5 million in aid total dollars to 30,090 students in Winter 2010 - an increase of 17% in aid dollars overall. The currently noted drop in the percentage disbursed during the 1st week is most probably due to two factors: The data timing issue (as noted in the "definition" above), and a change in data collection methodology.

Prior to this report, SFS utilized two paper-intensive reports for calculating this measure. With the migration by the UW to an Enteprise Data Warehouse (EDW) and inline with the Washington State mandate to lower paper utilization, SFS now conducts direct data extracts for this measure. The resulting data set and subsequent calculations may not perfectly align with prior reportings. Additional data points are required to determine if the measure will require adjustment. However, measure remains stable with less than 2% within-quarter variance in reporting.
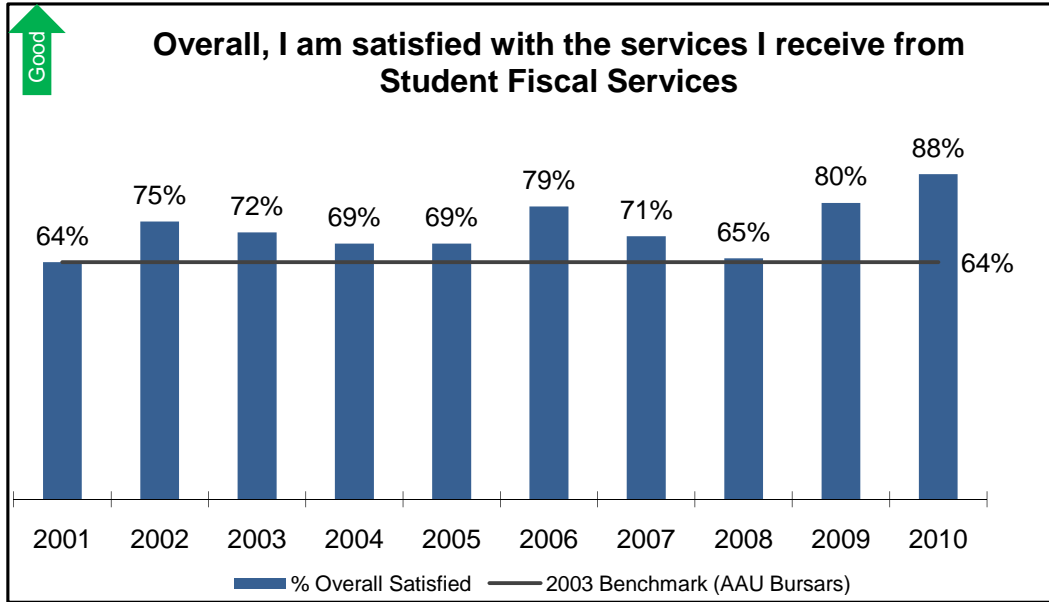
NEXT STEPS
SFS will set new targets on a "per quarter" basis on the Spring report. Investigation of the data report timing variance and the validation of the new methodology are on-going, but will not be complete for three or more additional quarters of data collection. Measure will be realigned within one year and include additional context for process partner activities which influence the disbursement process.

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Student Satisfaction - SFS

Customer

Overall, I am satisfied with the services I receive from Student Fiscal Services

Good →

Bar chart values:
- 2001: 64%
- 2002: 75%
- 2003: 72%
- 2004: 69%
- 2005: 69%
- 2006: 79%
- 2007: 71%
- 2008: 65%
- 2009: 80%
- 2010: 88%

Benchmark line: 64%

Legend: ■ % Overall Satisfied — 2003 Benchmark (AAU Bursars)

Student Satisfaction with Online/Remote Service Delivery

- 2008: 54%
- 2009: 64%
- 2010: 79%

Academic Year

Student Satisfaction with In-Person/Counter Service Delivery

- 2008: 79%
- 2009: 91%
- 2010: 95%

Academic Year

DEFINITION
The Financial Management Student Fiscal Services (SFS) department conducts an annual survey during the Spring quarter to gauge student satisfaction with SFS services. This is benchmarked against the most currently available (2003) AAU Bursars "customer satisfaction" rating of 64%. In addition, SFS now tracks an aggregated response rating of students satisfaction with service delivery channels (online/remote vs. in-person/counter) -- benchmark to be determined.
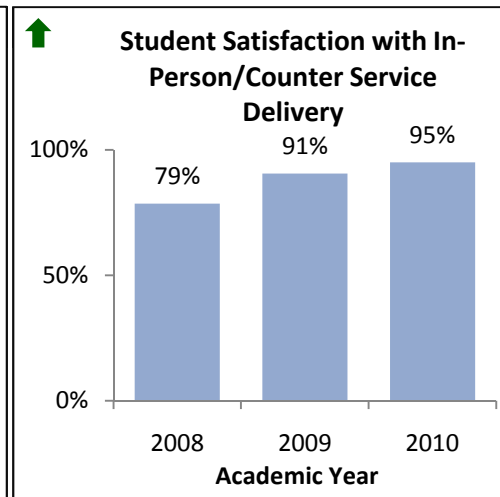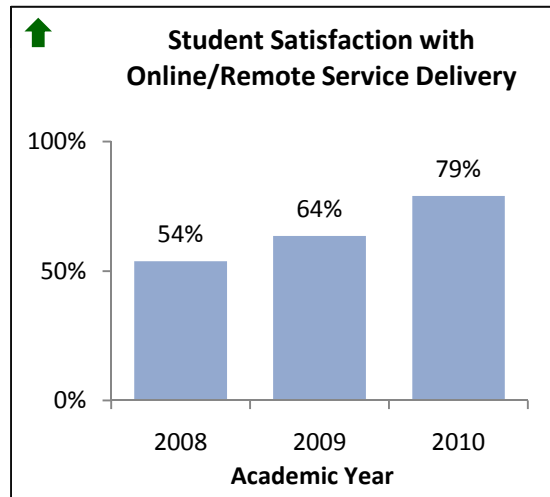
ANALYSIS
This measure reporting is a preliminary reporting - final results will be posted on the next dashboard report. Data collection is still underway. To date, 828 customers have taken the survey with 741 having taken it on paper in our lobby/cashier area, and 87 remotely via the Web.

Historically, the "in person" customers taking the survey on paper have expressed greater satisfaction with SFS services than those taking the survey via Catalyst (e.g., the Web). We anticipate that increased online/remote participation in the survey will result in a matching of this trend - with a percentage decline of satisfaction across all areas reported.
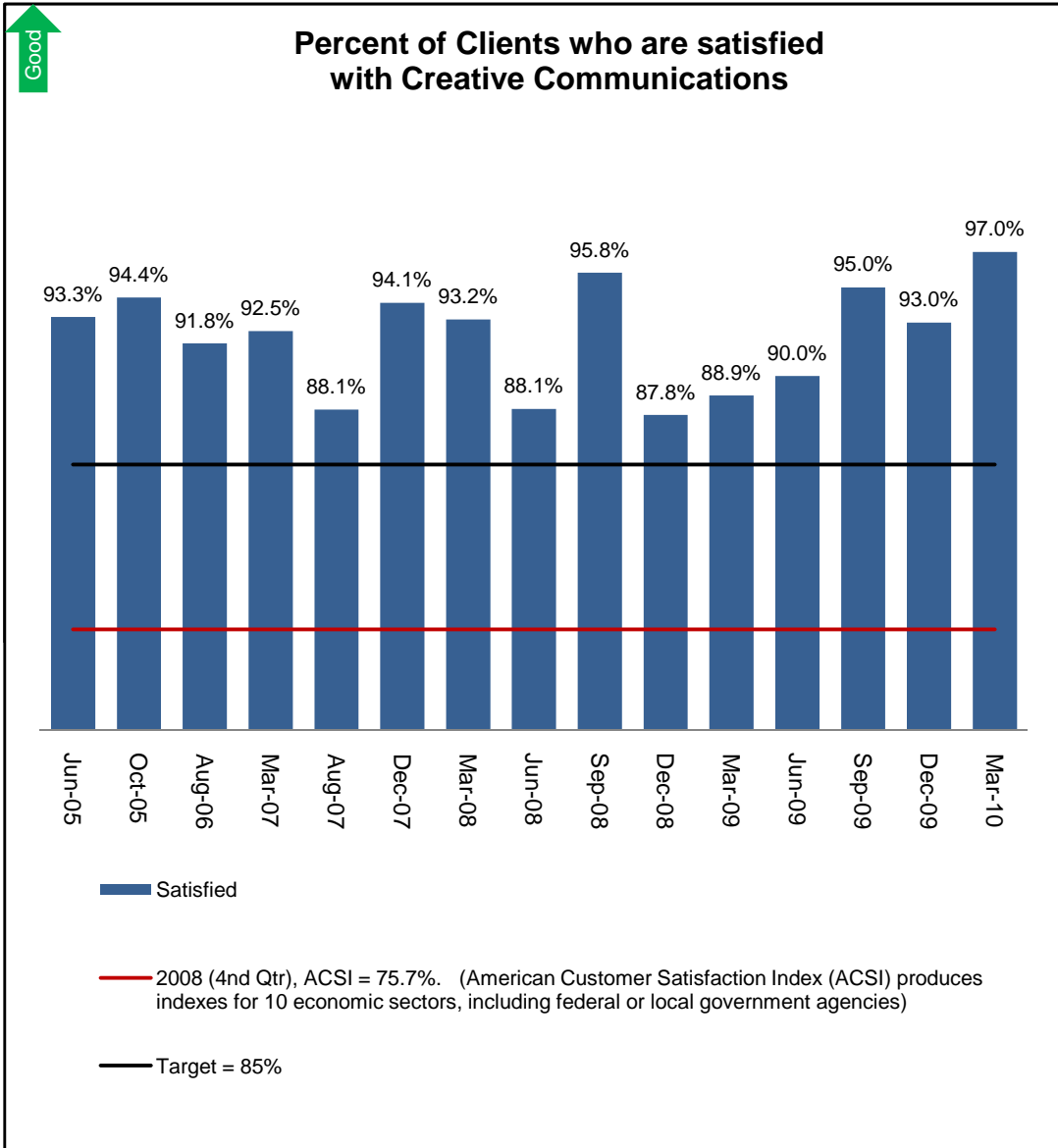
NEXT STEPS
Current data collection continues to attempt to increase the remove/web response participation through a targeted email effort.

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Client Satisfaction - Creative Communications

Customer

Percent of Clients who are satisfied with Creative Communications

Good →

Bar chart data:
- Jun-05: 93.3%
- Oct-05: 94.4%
- Aug-06: 91.8%
- Mar-07: 92.5%
- Aug-07: 88.1%
- Dec-07: 94.1%
- Mar-08: 93.2%
- Jun-08: 88.1%
- Sep-08: 95.8%
- Dec-08: 87.8%
- Mar-09: 88.9%
- Jun-09: 90.0%
- Sep-09: 95.0%
- Dec-09: 93.0%
- Mar-10: 97.0%

◼ Satisfied

—— 2008 (4nd Qtr), ACSI = 75.7%.   (American Customer Satisfaction Index (ACSI) produces indexes for 10 economic sectors, including federal or local government agencies)

—— Target = 85%

DEFINITION
For 2 weeks each quarter, all customers with delivered products are asked to complete a point of service survey. The web-based survey measures customers' satisfaction with product quality, timeliness, and service in the areas of Mail Prep, Copy Services, and Print Services.

ANALYSIS
The percentage of satisfied clients reached an all time high of 97%. We are pleased with this positive feedback from our clients, and it fulfilled one of our four strategic objectives – Provide an excellent client experience.

As proposed two quarters ago, we will survey our clients once every six months. We based our decision on the following factors: years of survey results, consistent and above target rates, and potential client survey fatigue. The next survey will be completed for fall 2010.

Digital StoreFront (DSF) web interface update: Our team continues to add additional products to DSF and continues to improve the online web interfaces. The current work includes Medical School stationary, letterhead and business cards.

-Total jobs = 4,913
-Total invites = 308
-# of responses = 80
-% of total jobs = 6.3%
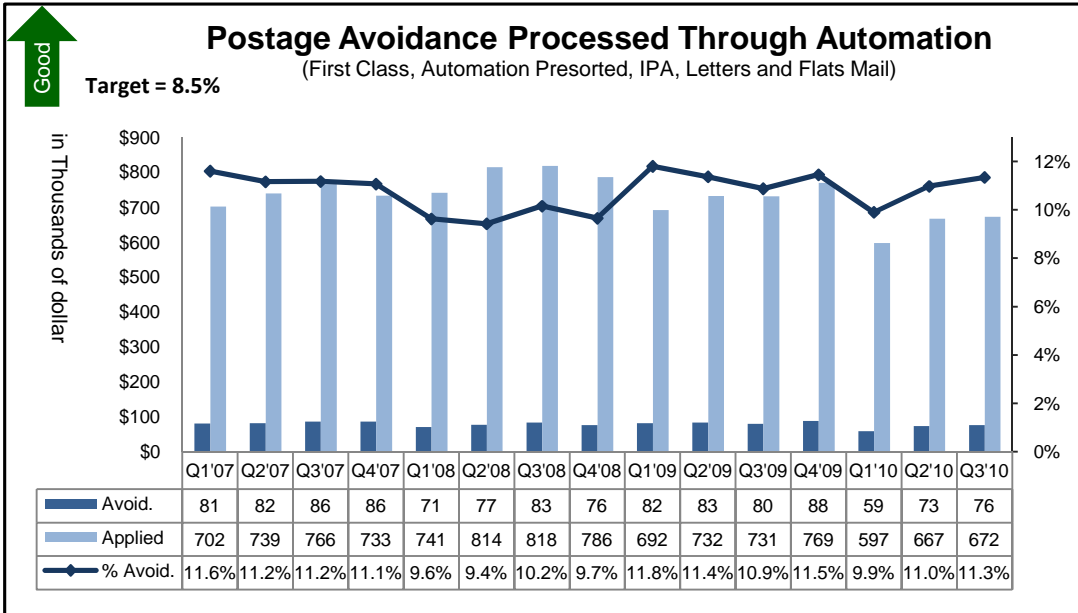-% of responses = 26%

NEXT STEPS
These recommended actions are extracted from the comments provided by customers.
  - Improve online ordering system
  - Provide more frequent status updates
  - Communicate delivery timeline, particularly when job is printed on specialty paper
  - Streamline process between print production and mailing

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Postage Avoidance

Financial

Postage Avoidance Processed Through Automation
(First Class, Automation Presorted, IPA, Letters and Flats Mail)

Good ↑

Target = 8.5%

in Thousands of dollar

	Q1'07	Q2'07	Q3'07	Q4'07	Q1'08	Q2'08	Q3'08	Q4'08	Q1'09	Q2'09	Q3'09	Q4'09	Q1'10	Q2'10	Q3'10
Avoid.	81	82	86	86	71	77	83	76	82	83	80	88	59	73	76
Applied	702	739	766	733	741	814	818	786	692	732	731	769	597	667	672
% Avoid.	11.6%	11.2%	11.2%	11.1%	9.6%	9.4%	10.2%	9.7%	11.8%	11.4%	10.9%	11.5%	9.9%	11.0%	11.3%

DEFINITION
Mailing Services generates daily savings through compliance with the United States Postal Service (USPS) "Workshare" discount mail programs.

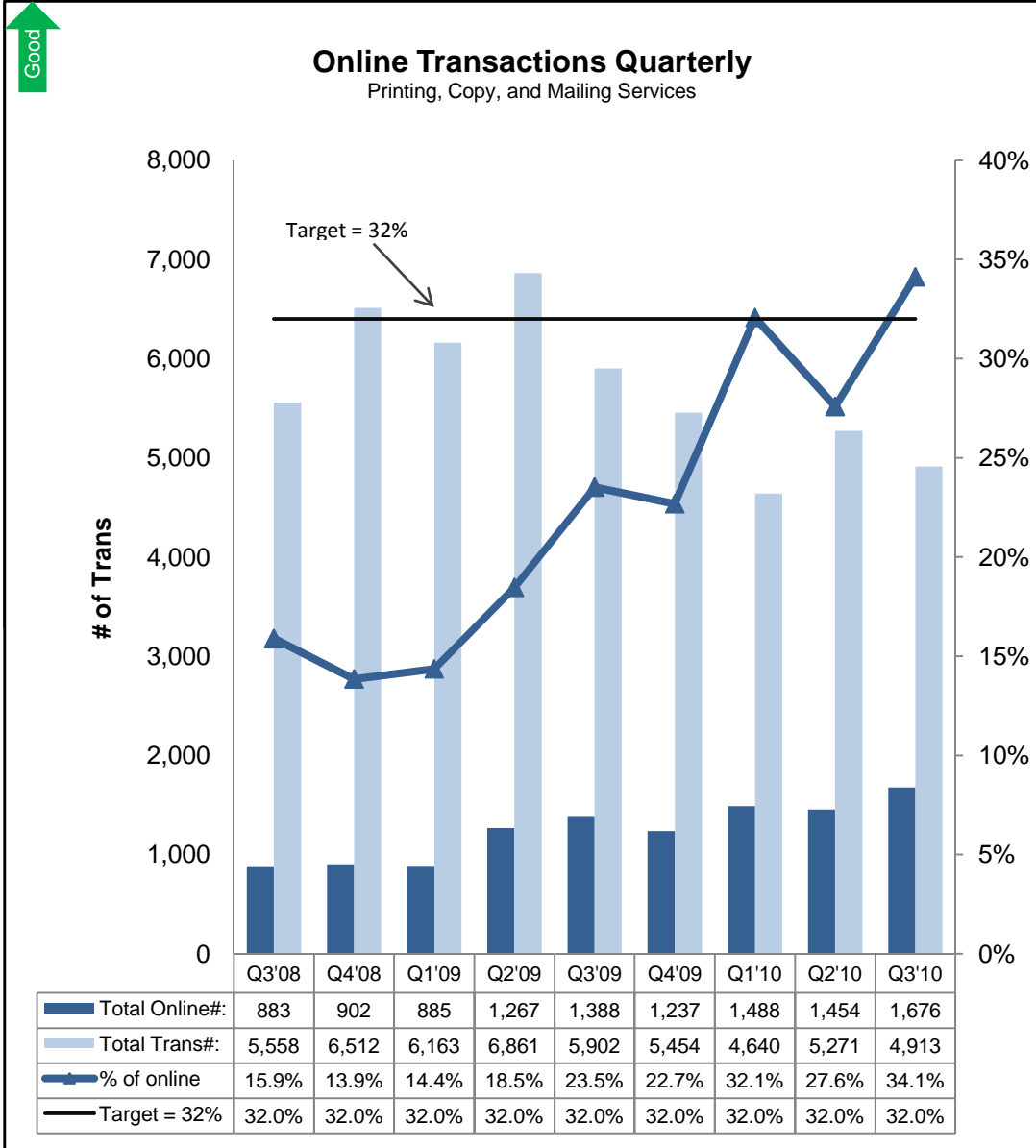The chart displays the savings (avoidance) on a quarterly basis.

ANALYSIS
The decline in mail volume and resultant reduction in postage avoidance is due to a combination of different factors. These include increased usage of electronic communications, changing communication methods, budgetary limitations, and a decrease in postage discount rates by the USPS.

NEXT STEPS
Enhance employee training to help identify mail that could be automated and further improve mail design through increased communication with clients and graphic designers.

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Increase Online Transactions - Creative Communications

Internal Business Process

Good →

Online Transactions Quarterly
Printing, Copy, and Mailing Services

Target = 32%

# of Trans

	Q3'08	Q4'08	Q1'09	Q2'09	Q3'09	Q4'09	Q1'10	Q2'10	Q3'10
Total Online#:	883	902	885	1,267	1,388	1,237	1,488	1,454	1,676
Total Trans#:	5,558	6,512	6,163	6,861	5,902	5,454	4,640	5,271	4,913
% of online	15.9%	13.9%	14.4%	18.5%	23.5%	22.7%	32.1%	27.6%	34.1%
Target = 32%	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%	32.0%

DEFINITION
Shows the number of orders submitted to C2 via web based online ordering, excludes orders placed via email or digital files sent via web file transfer or ftp. Currently orders are placed through three different web interfaces: Digital StoreFront (DSF), Print and Copy request, and Mail request.

Advantages of our online system include ease of client access to our services and products, job processing efficiency, integration of services, and improved accuracy and product quality.

ANALYSIS
A combination of an increase in the online transactions and a decrease in the total transactions has resulted in a 7.0% increase from the previous quarter, or 34.1% for the quarter. The increase in the online transactions is a positive indicator of the additional products added to DSF and the continued improvements to the online web interfaces. However, a decrease of 7.0% of total transactions from the previous quarter demonstrates a cautious demand from the campus community, due to the current economic conditions and the UW sustainability initiative.

We have now surpassed our 26% target (set in Q4'09) the last three quarters. With continued improvements on the web interfaces and the addition of new products, we are re-setting this target to 32% for future periods, with a stretch target of 50% by the end of spring quarter 2011.
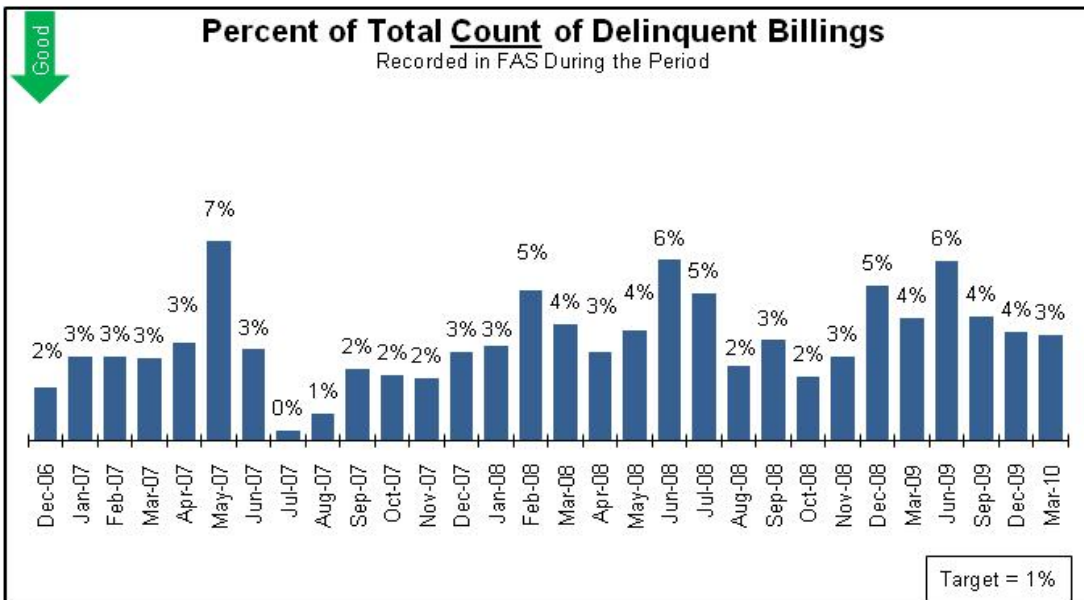
Current DSF products include: business cards, campus products (formerly UStore products), letterhead and envelopes, and unique styles for School of Public Health. Completed implementation of UW Seal & traditional business cards.

NEXT STEPS
Continue final stage of Medical School stationary, letterhead and business cards implementation.

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Manage Financial Reporting - Financial Accounting

Internal Business Process

Percent of Total <u>Count</u> of Delinquent Billings
Recorded in FAS During the Period

Target = 1%

Percent of Total <u>Dollars</u> of Delinquent Billings
### Recorded in FAS During the Period

Target = 1%

DEFINITION
Percent of total count or dollars of Cost Transfer Invoices (CTIs) and Internal Sales Documents (ISDs) that are processed later than the month following the date of service. Late billings lead to untimely budget status as well as the possibility of lost funds (in the case of grants that have closed prior to receiving a bill).

ANALYSIS
Monthly Average Totals during the Jan - Mar period: CTI/ISD Count = 39,000, Dollars = $23 Million

23% of this quarter's late transaction count is represented by three users:

1) Department of Medicine (541)
2) HMC Patient Care Services (241)
3) Intercollegiate Athletics (151)
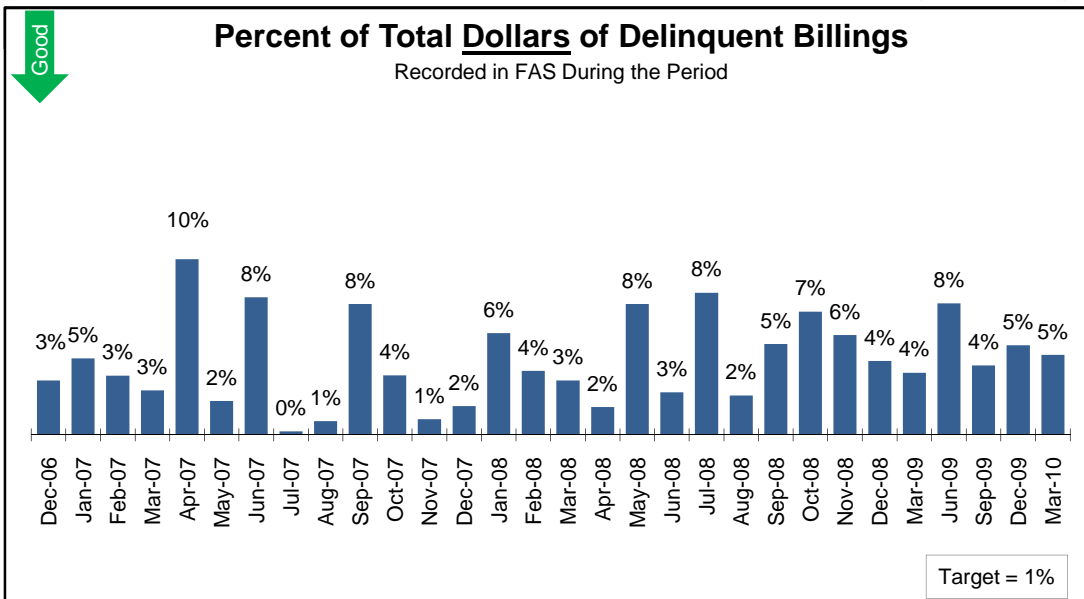
47% of this quarter's late dollars is represented by six users:

1) School of Oceanography ($457,537)
2) Gen'l Svc (Physical Plant Opers, UW IT Rev) ($345,853)
3) Department of Medicine ($320,846)
4) Transportation Div (UW Finance & Facilities) ($152,804)
5) UWEO ELP-IOP ($130,482)
6) School of Pathology ($100,811)

NEXT STEPS
Continue direct communication with recurring late billing departments.

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Internal Business Process

New productivity under development, will be available for next quarter.

DEFINITION
Productivity is a ratio of (unit of work) to (FTE). Unit of work is defined by the department. It is the best proxy indicator of output representing the workload of the group (e.g., # of research budgets, # of pieces of equipment tracked, # of transactions). FTE represents the people doing the work. This ratio depicts whether FM is doing more with less, or less with more staff over the years. However, to provide a more complete picture, other critically important issues should also be considered/presented: backlog, quality of work (errors & deviations), customer satisfaction, work not represented by chosen output, benchmark to industry/best practices, and the choice of base year.
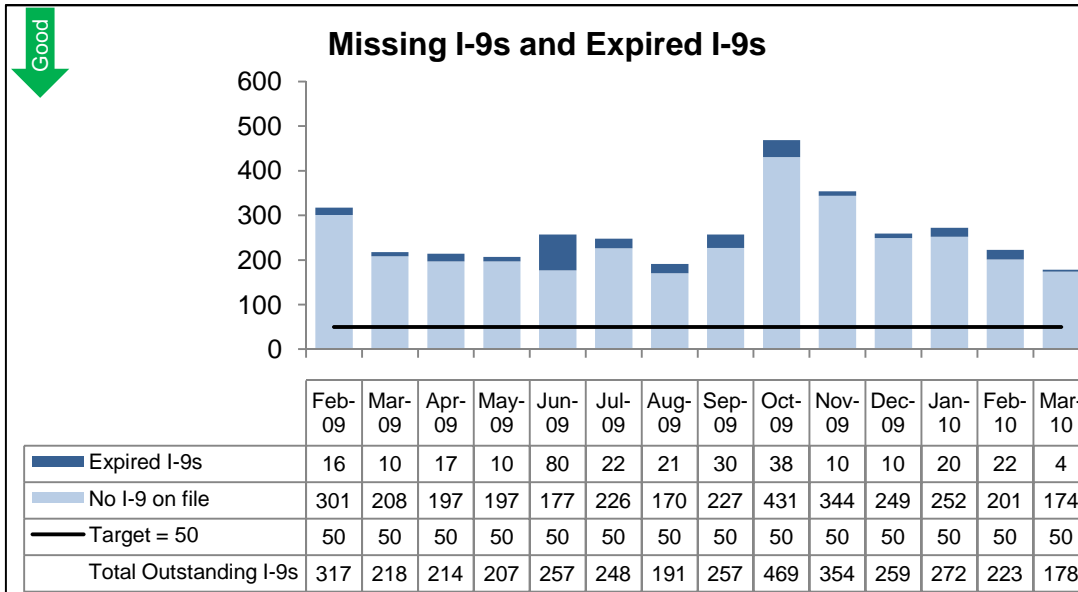
ANALYSIS
The top chart for December 2009, showcases the revised 2008 prior measure and an all-new 2008 forward graph. Some, more recent, FM productivity data points inaccurately added and removed FM departments reflecting multiple reorganizations without readjusting to the base year. The graph below restates FM productivity and consistently includes the same population throughout the years. Measure change in 2008 forward include a new 2008 base year (reset for all Finance & Facilities), inclusion of Purchasing, and FTE actuals (previously budgeted).

NEXT STEPS
1. Inclusion of Creative Communications (C2)?
2. We continue to eliminate transaction-related work through increased automation and to develop needed knowledge worker positions. This will have the effect of reducing productivity (particularly where there's been no significant increase in transaction volume), by increasing the denominator (FTE's)

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Pay People - Payroll

Internal Business Process

Good

Missing I-9s and Expired I-9s

	Feb-09	Mar-09	Apr-09	May-09	Jun-09	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10
Expired I-9s	16	10	17	10	80	22	21	30	38	10	10	20	22	4
No I-9 on file	301	208	197	197	177	226	170	227	431	344	249	252	201	174
Target = 50	50	50	50	50	50	50	50	50	50	50	50	50	50	50
Total Outstanding I-9s	317	218	214	207	257	248	191	257	469	354	259	272	223	178

Good

Outstanding I-9s for Hospitals & Non-Hospital

	Feb-09	Mar-09	Apr-09	May-09	Jun-09	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10
Non-Hospital	206	122	121	122	174	166	117	187	385	262	173	182	143	103
Hospitals	111	96	93	85	83	82	74	70	84	92	86	90	80	75
Target = 50	50	50	50	50	50	50	50	50	50	50	50	50	50	50

DEFINITION
This measure shows the total number of undocumented I-9s and expired I-9s for all university employees.
The top graph compares the total number of undocumented I-9s to the number of expired I-9s.
The bottom graph compares the number outstanding from the hospitals to all other departments.
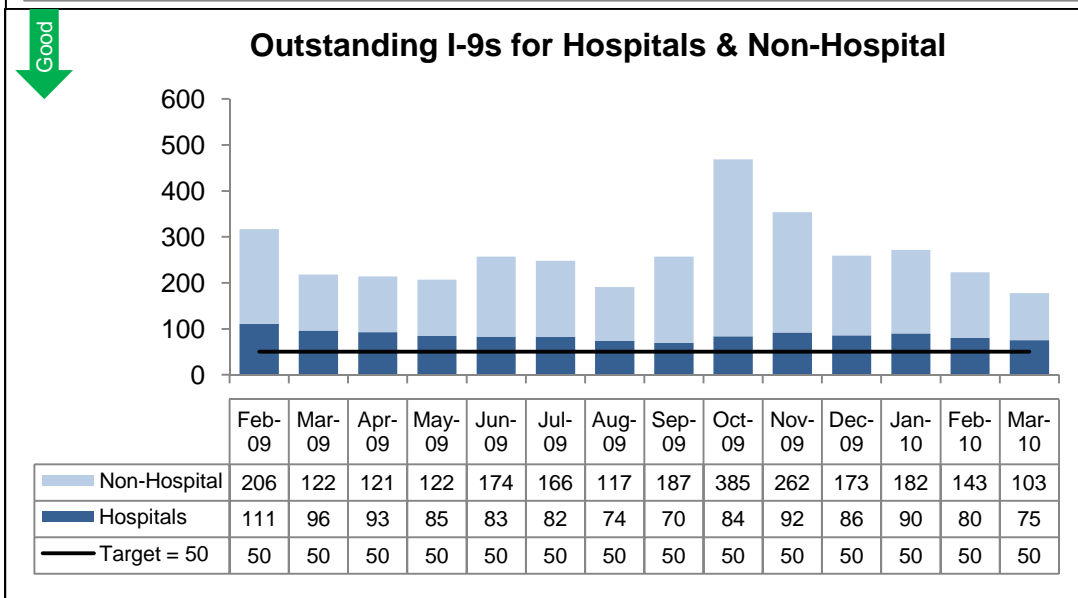
ANALYSIS
The number of expired I-9s has decreased. The number of missing I-9s has also decreased (each month since October 2009; beginning academic year). Potential Risk: Up to $40,000 per I-9 missing or expired = 178 * $40,000= $7,120,000. Number of UW Employees = 36,000. The number of missing and expired I-9s represents less than 1% of the total number of UW employees. In March, of a total of 178 cases, 159 were active and 19 inactive (11%). Expired I-9s are often higher in September and October, new hires have been placed in the payroll system for fall quarter academic appointments; however, the employee has not arrived on campus (quarter start date 9/30/09).
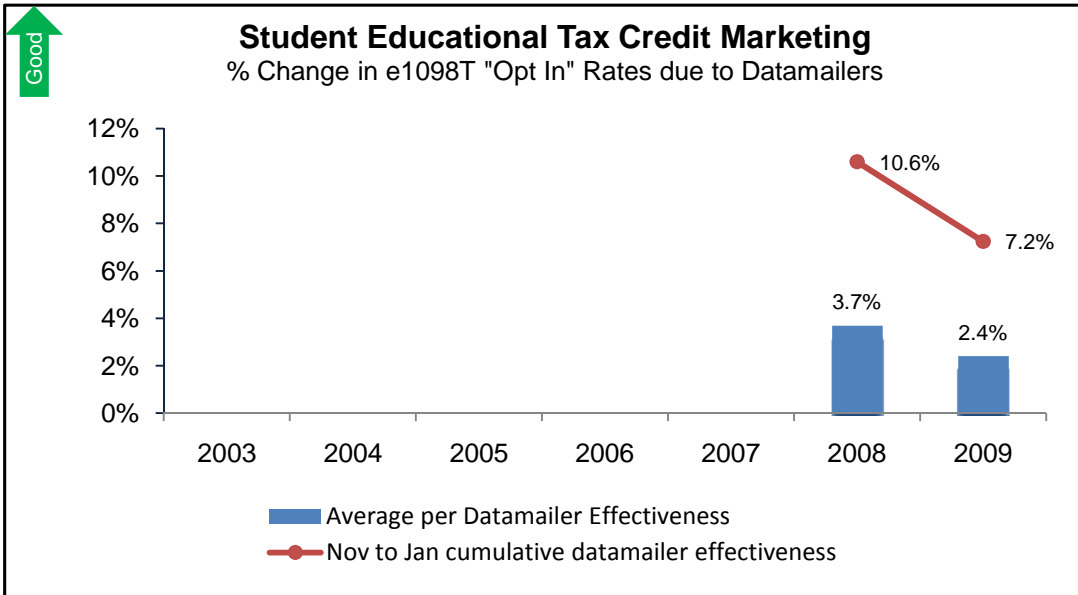
NEXT STEPS
The Assistant Director is calling and emailing departments with high numbers of undocumented I-9s to determine the issues involved and work with them to get their numbers down. Detailed spreadsheets are being sent to the Medical Center Human Resources office to help them reduce the number of employees on their list. Departments with expired I-9s are contacted every month for resolution. Also reviewing current process in the Payroll Office for process improvement.

Report Contact: Jeanne Semura, semurj@u.washington.edu

Provide Services - SFS

Customer

Student Educational Tax Credit Marketing
% Change in e1098T "Opt In" Rates due to Datamailers

Good ↑

- ■ Average per Datamailer Effectiveness
- ●— Nov to Jan cumulative datamailer effectiveness

Student Educational Tax Credit Reporting
Cumulative % e1098T "Opt In" Rates

Good ↑

DEFINITION
The University of Washington, through Student Fiscal Services in conjunction with other UW offices, compiles information on qualified expenses charged, and aid received, for all "students" (tuition and fee-based) who may be eligible for an IRS educational tax credit. By law, UW provides this information to students for preparation of their tax returns, and reports it the IRS.

Starting with tax year 2008, students can "opt in" to receive this form electronically through MyUW (i.e., an e1098T). Student Fiscal Services (SFS) notifies students of this option through a variety of channels during autumn quarter of each year. This measure tracks both the per year effectiveness of our data mailing marketing efforts, and the on-going transition from paper-based 1098T mailing of forms to electronic 1098T customer self-access to reduce printing and mailing costs.
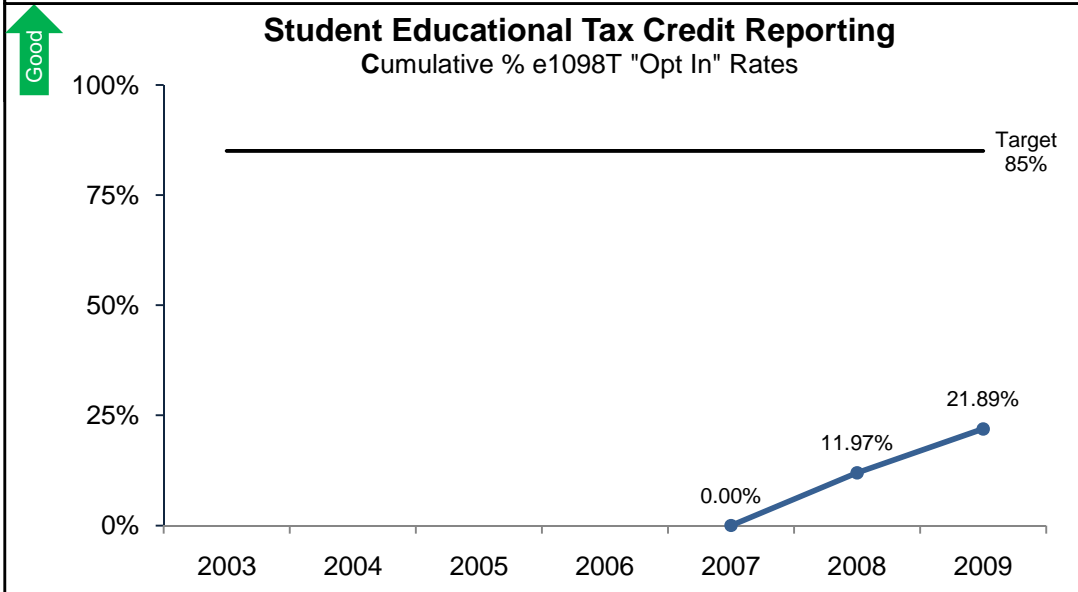
ANALYSIS
The effectivness of our data mailer promotional campaign to get students to sign up for e1098Ts was not as effective this year as last -- as a result of timing (months of notifications sent) and frequency (number of notifications sent)

Timing: In 2008, we sent five seperate data mailers from November through January. In 2009, we did only three data mailers which resulted in 7,027 additional students "opting in" to receive e1098Ts (a decrease of 1,225 eligible students).

Frequency: In 2009, each data mailer resulted in an average increase of 2.4% in e1098T opt in rates. As of January 2009 (the end month of our final notification), our overall "effectivenss" dropped to 7.2% from the prior year's 10.6%.
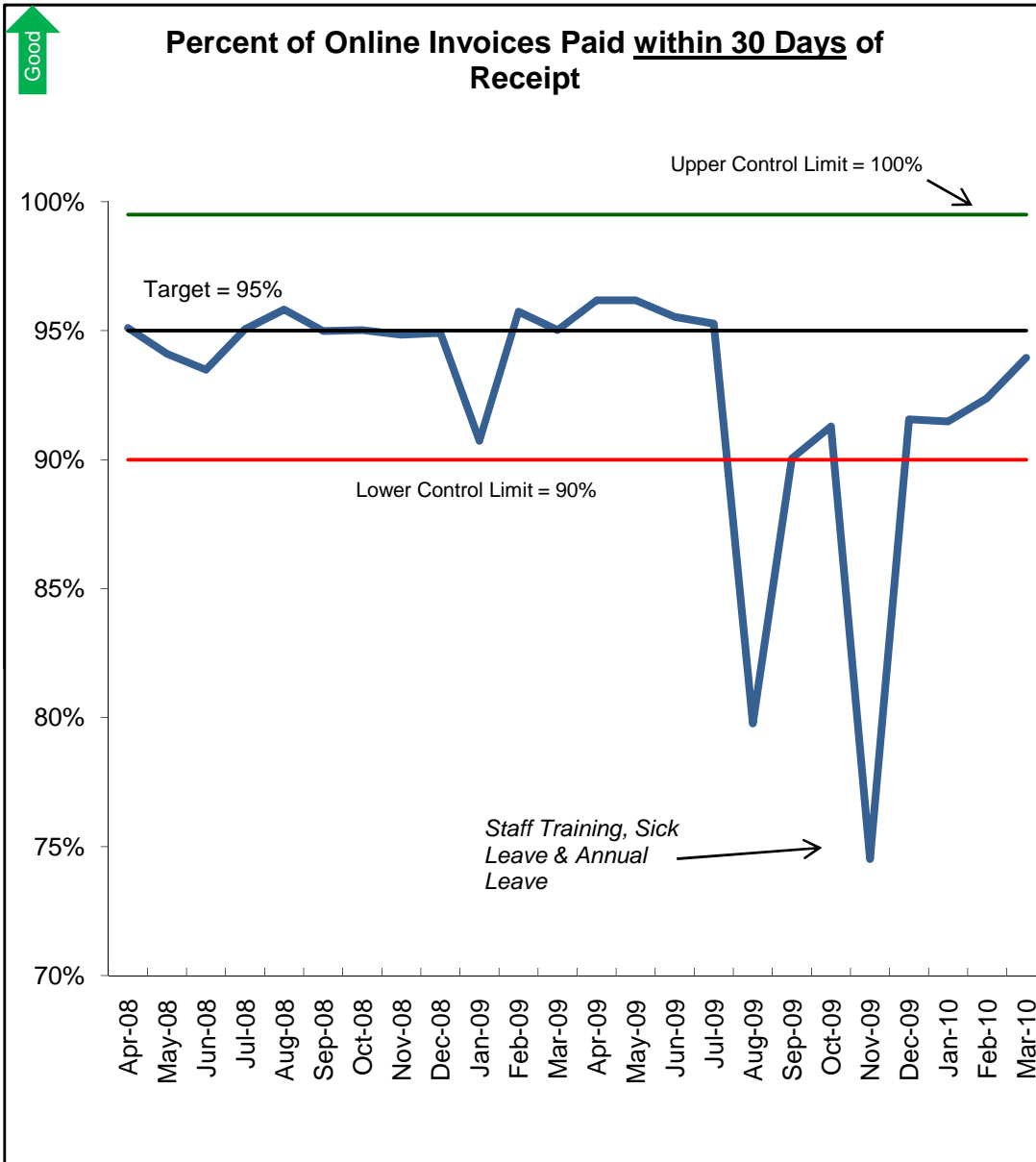
NEXT STEPS
SFS will continue to notify students of e1098T availability, through targeted data mailers, the SFS website and information within our Cashier area -- with the intent to standardize both the timing and frequency of the e1098T service availability notification efforts.

Report Contact: Jeanne Semura, semurj@u.washington.edu

Pay Bills Online Invoices Paid Within 30 Days of Invoice Date - Proc. Svs.

Financial

Percent of Online Invoices Paid <u>within 30 Days</u> of Receipt

Good

Upper Control Limit = 100%

Target = 95%

Lower Control Limit = 90%

Staff Training, Sick Leave & Annual Leave

DEFINITION:
Identifies the number of days between receipt of vendor invoice in Accounts Payable and the check date. WA State requirement is 30 days.
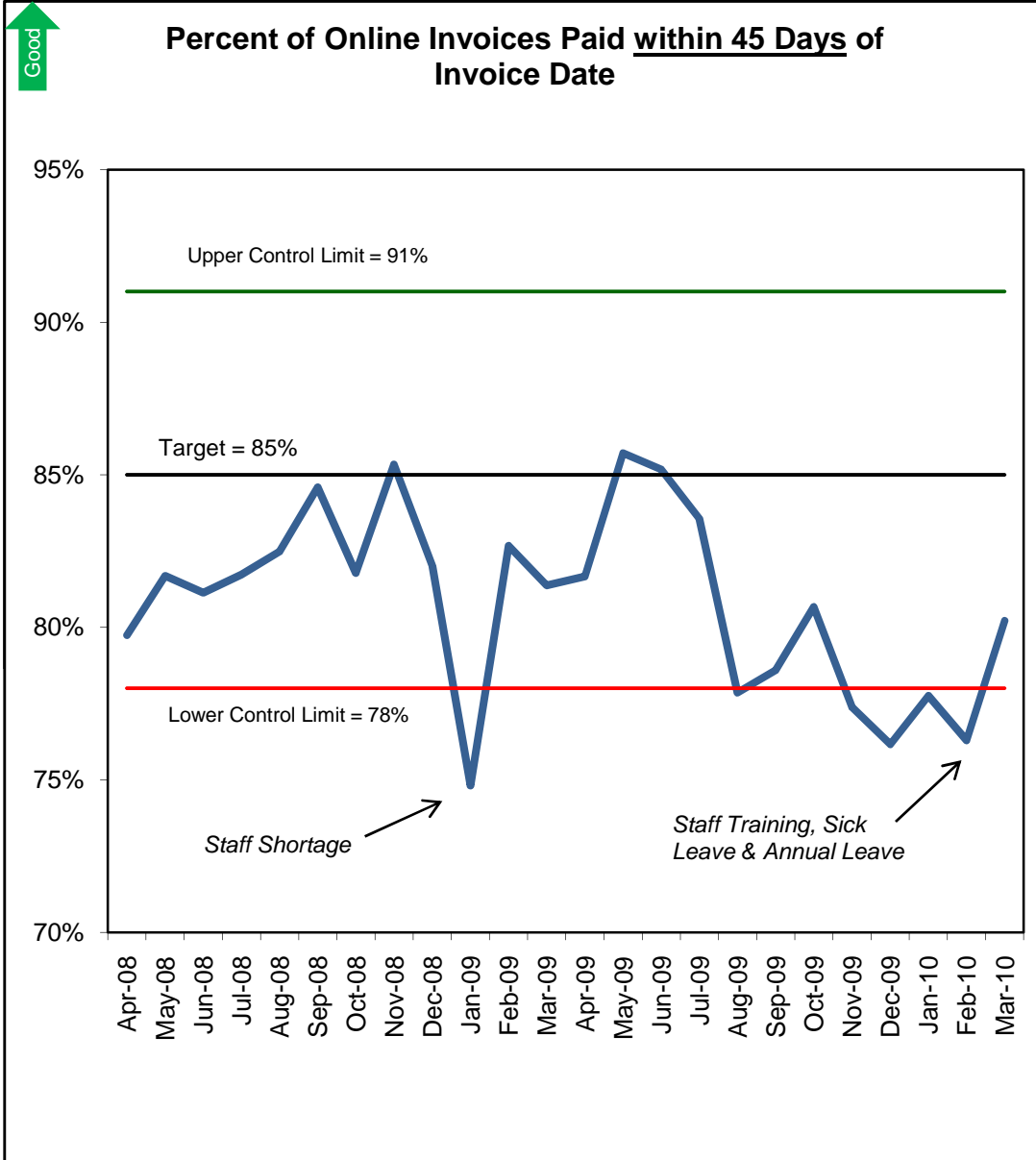
ANALYSIS:
In March 2010, 94% of online invoices were paid within 30 days. This measure shows significant improvement in the past few months as we've taken the necessary steps to compensate for our decrease in staff. Note that while the number of online invoices is less than in prior years due to our ongoing efforts to migrate transactions from PAS to eCommerce, we're finding that the "problem" or "difficult" invoices are being processed by the Accounts Payable group. Accordingly, this shift in the relative proportion of "problem invoices" to "easy invoices" is having a downward impact on our dashboard measures. We are continuing to work with all process partners to migrate as many "problem" invoices as possible to Ecommerce. One example of this is compressed gas orders which constitute about 20% of all small dollar discrepancies. We hope to migrate all these orders to Ecommerce by FY10. Additionally, we're continuing our efforts to expand the Bank of America (BOA) Electronic payment program which began in October 2009.

NEXT STEPS:
Procurement Services is continuing to migrate transactions from PAS to eCommerce. However, as this is an on-going project, the volume of invoices processed by our area may show a considerable degree of fluctuation from month to month. Once the workload volume of online invoices has stabilized, our cycle times should also stabilize as well.

Report Contact: Jeanne Semura, semurj@u.washington.edu

Pay Bills Online Invoices Paid Within 45 Days of Invoice Date - Proc. Svs.

Financial

Good

Percent of Online Invoices Paid <u>within 45 Days</u> of Invoice Date

Upper Control Limit = 91%

Target = 85%

Lower Control Limit = 78%

Staff Shortage

Staff Training, Sick Leave & Annual Leave

DEFINITION:
Identifies the number of days between the invoice date and the payment date.

ANALYSIS:
As with the 30 day measure, this metric has improved as we've taken the necessary steps needed to compensate for our decrease in staff. Many invoices which were previously being sent directly to AP from suppliers are now being moved to eCommerce. This migration has resulted in a greater proportion of invoices sitting in the departments before coming to AP which has slowed down the average cycle time. To illustrate, several years ago the average holding time (Invoice Date – Received Date) for invoices was approximately 18 days. Today, that number has increased to 24 days.
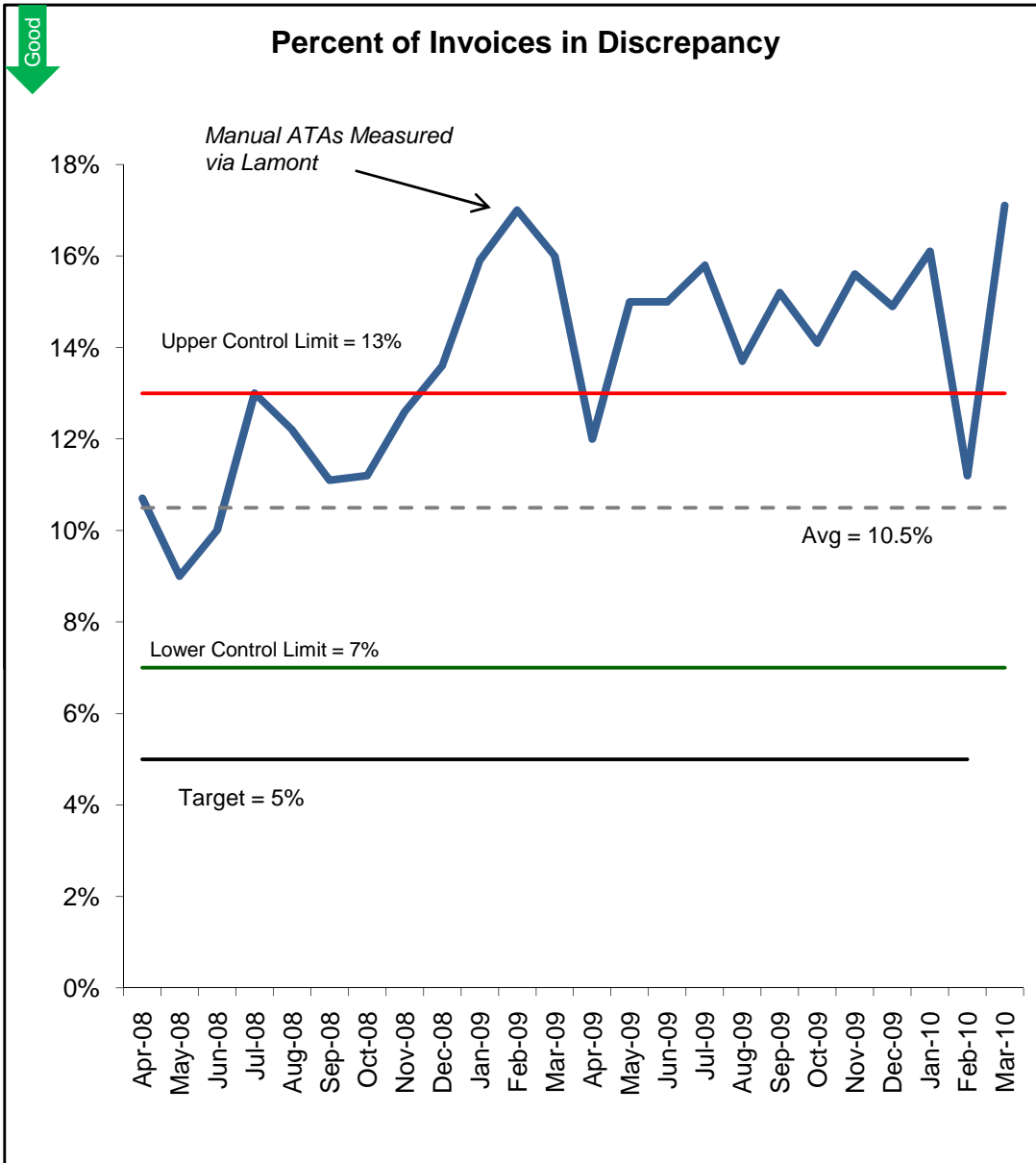
NEXT STEPS:
AP continues to remind UW departments and outside suppliers to send their invoices DIRECTLY to AP. However, this is not something within our direct control. Additionally, Procurement Services continues its efforts to migrate transactions into eCommerce. This is especially true with respect to compressed gas orders. A targeted plan is now currently in place to move these orders to eCommerce as they have an unusually high rate of discrepancies, which slows downs the payment cycle.

Report Contact: Jeanne Semura, semurj@u.washington.edu

Pay Bills - Invoices with Discrepancies - Proc. Svs.

Financial

Good

Percent of Invoices in Discrepancy

Manual ATAs Measured via Lamont

Upper Control Limit = 13%

Lower Control Limit = 7%

Target = 5%

Avg = 10.5%

(x-axis: Apr-08, May-08, Jun-08, Jul-08, Aug-08, Sep-08, Oct-08, Nov-08, Dec-08, Jan-09, Feb-09, Mar-09, Apr-09, May-09, Jun-09, Jul-09, Aug-09, Sep-09, Oct-09, Nov-09, Dec-09, Jan-10, Feb-10, Mar-10)

DEFINITION:
Quantifies the percentage of vendor invoices in which a discrepancy exists between the original Purchase Order and the actual invoice. Such inconsistencies need to be researched and rectified before payment can occur. Discrepancies are a function of department input, purchasing order set-up, payables processing, and supplier billing.
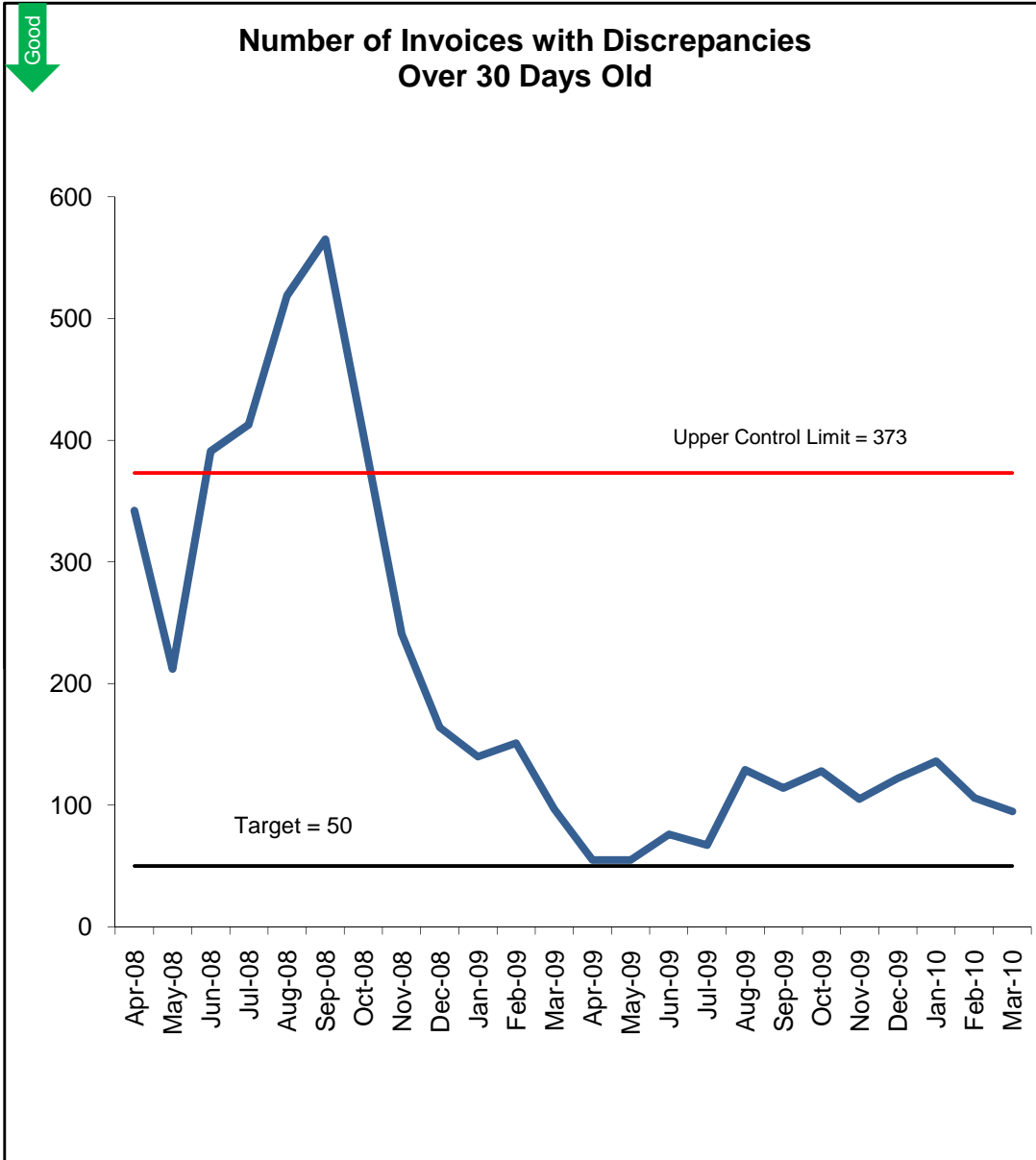
ANALYSIS:
The increase in percentage of invoices with discrepancies in December 2008 is the outcome of more accurate counting – previously the measure was a manual count; currently the measure has been automated in Margo and so represents a more realistic count.

NEXT STEPS:
In addition to more accurate counting, this measure has also been impacted by our continuing efforts to migrate purchases from PAS to eCommerce. Specifically, please note that while the number of online requisitions and invoices is less than what is was in prior years, we're finding that the "problem" or "difficult" purchases are still being processed manually by Procurement Services' staff. Accordingly, this shift in the relative proportion of "problem purchases" to "easy purchases" is having a negative impact on our ATA percentage figures even as the number of ATA is declining. Additionally, please note that as a result of a Seamless PIT sub team, we've developed a targeted outreach plan to migrate compressed gas orders to eCommerce as these orders constitute approximately 20% of all small dollar discrepancies. The goal is to eliminate all PAS based compressed gas orders by the FY10.

Report Contact: Jeanne Semura, semurj@u.washington.edu

Pay Bills - Invoices with Discrepancies Over 30 Days Old - Proc. Svs.

Financial

Number of Invoices with Discrepancies Over 30 Days Old

Good

Upper Control Limit = 373

Target = 50

DEFINITION:
Quantifies the number vendor invoices in discrepancy status for more than 30 days.
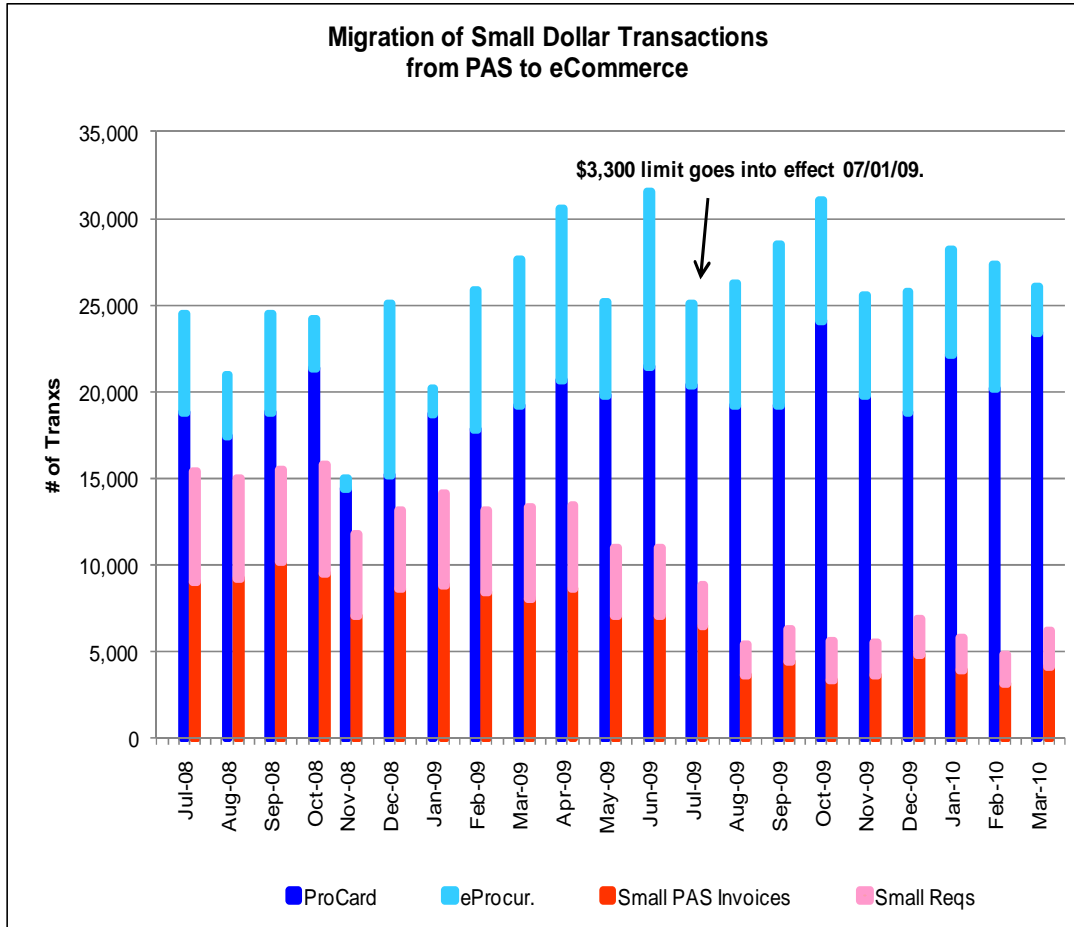
ANALYSIS:
To resolve these outstanding discrepancies, the original Purchase Order or the actual invoice must be modified (or the invoice itself must be approved) before payment can occur. This process can take time as it requires a coordinated effort between the Purchasing Services the UW department which placed the order, the supplier, and Accounts Payable.

NEXT STEPS:
This measure shows excellent results in reduction of discrepancies that are not resolved within 30 days, due to changes in prioritization of this resolution process as well as improvements in tracking via Margo and improved Purchasing/Payables communications. Also, many of these transactions could have been made through eCommerce methods. As we continue to migrate small dollar transactions to eCommerce, this measure could reach target. Specific actions currently underway include a targeted plan for discrepancies related to compressed gas orders. The goal is to have these eliminated by the end of FY10. Data review showed gas orders constituted nearly 20% of small dollar discrepancies.

Report Contact: Jeanne Semura, semurj@u.washington.edu

Migration of Small Dollar Purchases from PAS to eCommerce - Proc. Svs.

Financial

Migration of Small Dollar Transactions from PAS to eCommerce

$3,300 limit goes into effect 07/01/09.

Legend: ProCard | eProcur. | Small PAS Invoices | Small Reqs

DEFINITION
This chart tracks the migration of small dollar purchases from PAS to eCommerce, displaying the manual one requisition to multiple invoices relationship in PAS that creates 2 sets of documents, the requisition initiated by a campus department and managed by Purchasing (pink bar) and the resulting invoice (red bar) processed by AP for payment to complete the purchase cycle. In comparison, eCommerce produces one set of documents managed by the department that ordered the goods or services.

ANALYSIS
The goal is to migrate all eligible purchases to eProcurement and secondarily to ProCard if a supplier or commodity doesn't exist in Procurement. Using these purchasing options increases efficiencies and saves approximately $40 per transaction.
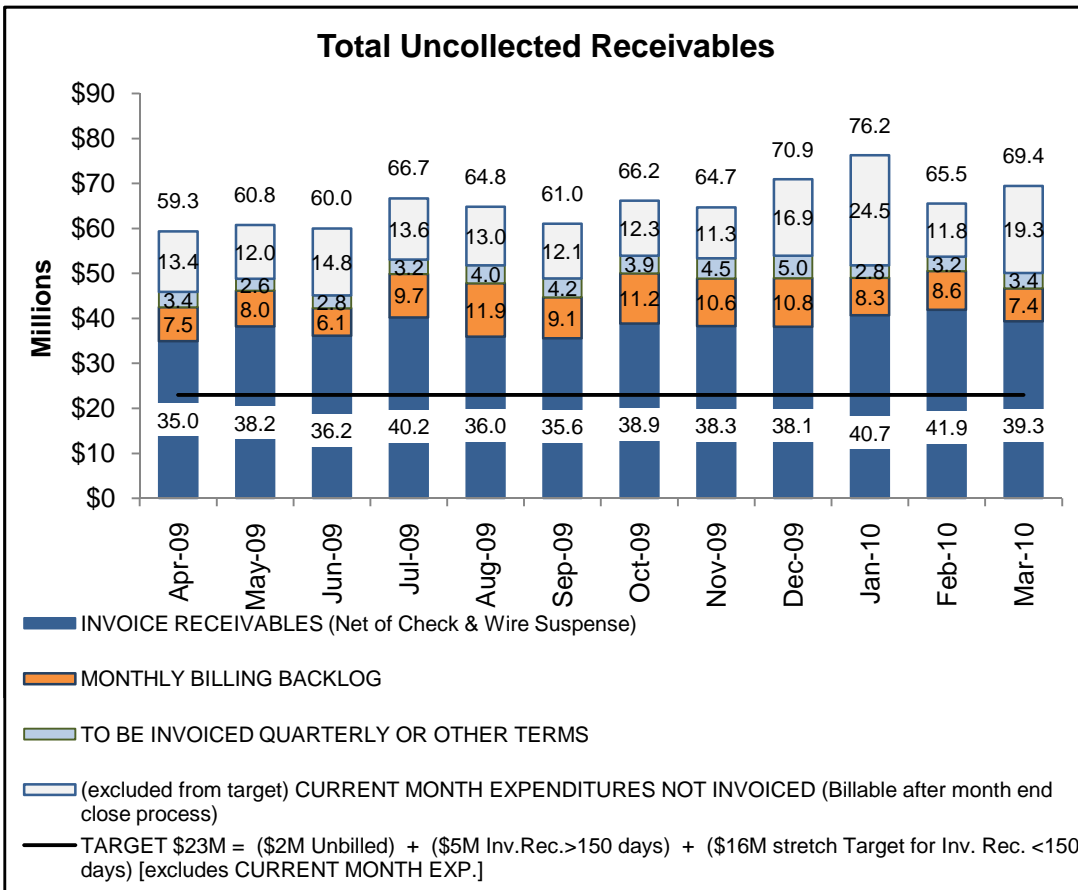
NEXT STEPS
Establish 10 additional contracts for eProcurement in 2010, followed by an additional 10 in 2011. Continue enhancements of the Ariba system and improve functionality of its suppliers with purchasing solutions such as eInvoicing, online quotes etc. Expand eProcurement to allow the use of non-contract suppliers for occasional or "one-off" purchases. Continue to conduct departmental outreach based on overall spend data analysis which includes data demonstrating how departments can better utilize eCommerce purchasing methods. The initiative to move all possible transactions under $3,300 into eCommerce has been highly successful and we're also currently trying to migrate all compressed gas orders to P-Card. Phase 2 requires follow-up outreach with departments, using enhanced data to assist them in identifying efficient and cost saving purchasing methods. There will also be a continued emphasis with online and in-person training, utilizing eCommerce websites more effectively, quarterly forums, email and newsletter communications to departments, emphasizing the use of the Procurement Guide, in addition to establishing a structure for effective internal communications to provide our customers with consistent Procure to Pay consultation and information from all Procurement Services units.

GOAL:
The eCommerce transactions (in blue) should be increasing . ↑ Good
The small dollar PAS transactions (in red) should be decreasing. ↓ Good

Report Contact: Jeanne Semura, semurj@u.washington.edu

Manage Grants Total Uncollected - GCA

Financial

Total Uncollected Receivables

INVOICE RECEIVABLES (Net of Check & Wire Suspense)

MONTHLY BILLING BACKLOG

TO BE INVOICED QUARTERLY OR OTHER TERMS

(excluded from target) CURRENT MONTH EXPENDITURES NOT INVOICED (Billable after month end close process)

TARGET $23M = ($2M Unbilled) + ($5M Inv.Rec.>150 days) + ($16M stretch Target for Inv. Rec. <150 days) [excludes CURRENT MONTH EXP.]

2009 UW Annual Report shows $152MM for Accounts Receivables Grants & Contracts

http://f2.washington.edu/fm/uw-annual-reports/sites/default/files/file/2009_Annual_Report.pdf (p.25)

Difference between Annual Report and dashboard graph is attributed to:

*Other forms of payment not represented in the graph (e.g. Letter of Credit, Schedule Pay, Fixed Price)

*Delay in posting expenditures (e.g. month 12/25/25A/25B)

*Year end adjustments for deficits, suspense, doubtful accounts, and deferred revenue

*Last payroll in June posted in July, but as June expenditures.

(Cash for that payroll is received in July and posted as July cash)

DEFINITION

The up-front cost the University has expended that has not been reimbursed by the sponsors.

ANALYSIS

1. Current Month Expenditures (the top white portion) that represent an up-front cost to the University, although not billable until the month-end close process.
2. Billing backlogs are cumulative prior month expenditures not invoiced, comprised of two parts:

   a. The quarterly invoice backlog (the light blue portion) includes quarterly, semi-annually, and annually billing frequency that are not billable until the billing terms are due.

   b. The monthly invoice backlog (the orange portion) contains about 68% of the total backlog (~$10.8M) that should have been billed, but could not be, due to staff shortage, stringent requirements from sponsors, and other various reasons.

3. Invoice Receivables (the dark blue portion) are aged receivables including all aged 30 days or greater.

4. Current Month Expenditures are excluded from the Target of $23M.

NEXT STEPS

GCA's PIE team is trying to eliminate the manual invoicing backlog. One of the options being considered is applying the LEAN concept to increase the efficiency of the billing process.

Report Contact: Jeanne Semura, semurj@u.washington.edu

Collect Loans Students in Default on Loans - SFS

Financial

Federal Perkins Loan Cohort Default Rate
Compared to the National and PAC 10 Schools' Average Default Rates

Good

SFS Corrected
8.3%

7.8%

Reported
5.15%

4.49%

| 13.6% | 9.8% | 6.7% | 3.9% | 3.8% | 4.9% | 3.8% | 3.2% | 4.4% | 5.1% | 4.9% | 7.2% | **6.7%** |

1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009

UW Cohort Rate
PAC 10 Average Default Cohort Rate
Corrected National Average (for 2008)
National Average Default Cohort Rate

DEFINITION
This measure quantifies the percentage of students with a reporting cohort who are in default on their Perkins Federal loans and compares UW's default rates against the National and PAC 10 Schools' Average Default Rates. Student Fiscal Services (SFS) currently reports our default rate annually to the US Department of Education on the Perkins Fiscal Operations Report (FISAP).

Our current target is the National Average Default Cohort Rate, with a streatch goal of achieving the PAC 10 Average Default Cohort Rate. So long as UW maintains a rate less than 15%, there are no issues with respect to Federal requirements.

National Average Default Cohort Rate – defined by the U.S. Dept of Education as a national measure of borrowers who entered repayment during the prior fiscal year who are in default (270 days past due) by the end of the current fiscal year; PAC 10 Average Default Cohort Rate – a subset of the default cohort rates limited to PAC 10 institutions.

ANALYSIS
Current economic trends would indicate that we can expect an overall increase in defaults -- as students entering the workforce face increased competition for career-track jobs within their fields of study and an overall tighter employment market. Next reporting of this (and updates to the Cohort Rate) will be on the Spring dashbord report.

NEXT STEPS
SFS will continue with outreach, advising and other intervention activities as appropriate, while monitoring the performance of our 3rd party collection agencies.

Current legislation moving through Congress centralizes the Perkins Loan program within the US Department of Education. This measure will be replaced with a measure related to UW's Direct Loans programs once that occurs.

Report Contact: Jeanne Semura, semurj@u.washington.edu

Collect Loans Students in Default on Loans - SFS

Financial

Cumulative Perkins Loan
Default Rate and Defaulted Dollars by Fiscal Year

Good

Target 2.43%

3.66%
3.36%
3.01%
2.62%
2.77% 2.80%
2.38%
1.90%
1.58%
1.41%
1.25%
1.35%
1.28%

$3,196,022
$3,079,704
$2,954,943
$2,687,241
$2,863,957
$3,185,348
$2,883,208
$2,457,195
$2,154,464
$2,055,357
$2,018,980
$2,340,784
$2,455,103

1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009

Principal Amount Outstanding in Default
Cumulative Portfolio Default Rate
Target

DEFINITION

The "Cumulative Perkins Loan Default Rate and Defaulted Dollars by Fiscal Year" measures the overall "historical" default rate since inception of the program in 1959 in relation to the dollar amount in default at the end of the fiscal year. This default rate is derived by comparing the principal outstanding in default to the total dollars that have ever entered repayment. These values are derived from the Campus Partners status summary report for program 04650. The target for cumulative default rate is based on a 10 year average (1997 - 2007). Student Fiscal Services (SFS) goal is to minimize the overall default rate.

ANALYSIS

SFS used to report the Cumulative Default Rate on the Perkins Fiscal Operations Report (FISAP) up until the US Department of Education switched to the reporting of the Perkins Cohort Default Rate (which takes into account only the borrowers that have gone into repayment during one reporting period.) Historically, this measure displays UW's total Perkins Loan portfolio default trend and defaulted principal outstanding -- which, until end of FY 2008, was in a steady decline.
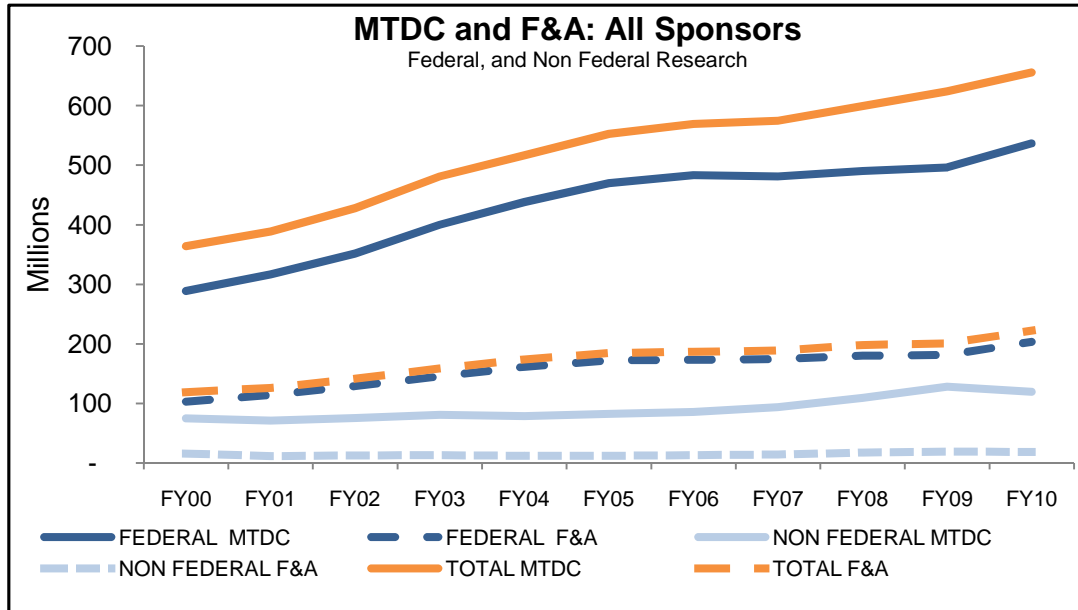
NEXT STEPS

Monitor this trend in relation to ongoing external economic conditions and continue to track 3rd party collection agencies' performance.

Target will be re-assessed if the current cumulative default rate stays below the current targeted average for an additional two years (i.e., by end of 2011).

As with the prior (related) measure, pending Congressional legislation will eliminate UW's oversight of the Perkins Loan program. This measure will be deleted once UW's Perkins Loan portfolio is transfered to be managed centrally within the US Department of Education.

Report Contact: Jeanne Semura, semurj@u.washington.edu

Develop and Negotiate Indirect Cost Rates - RAA

Financial

MTDC and F&A: All Sponsors
Federal, and Non Federal Research

Legend:
- FEDERAL MTDC
- FEDERAL F&A
- NON FEDERAL MTDC
- NON FEDERAL F&A
- TOTAL MTDC
- TOTAL F&A

% Change in F&A Indirect Cost Revenues
5 yr Average FY05Q4-FY10Q3: 3.3%
(Comparing current quarter recovery to the same quarter in last fiscal year)

Good

Values: 6.4%, 4.0%, 1.9%, 0.9%, -0.2%, 0.8%, 2.3%, 1.6%, 2.5%, 1.9%, 1.3%, 3.7%, 4.7%, 4.3%, 3.4%, 1.3%, 1.4%, 3.5%, 7.7%, 12.1%

Legend:
- % Annual Change
- ARRA %
- Target = 5% Increase from previous year

Quarters: FY05-Q4, FY06-Q1, FY06-Q2, FY06-Q3, FY06-Q4, FY07-Q1, FY07-Q2, FY07-Q3, FY07-Q4, FY08-Q1, FY08-Q2, FY08-Q3, FY08-Q4, FY09-Q1, FY09-Q2, FY09-Q3, FY09-Q4, FY10-Q1, FY10-Q2, FY10-Q3

DEFINITION
The Facilities and Administrative Cost Rate, or "F&A Rate", is a mechanism to reimburse the University for expenses incurred in providing facilities and administrative support to sponsored research and other sponsored projects. The F&A rate is essentially an overhead rate.

ANALYSIS
Decline in the growth rate of F&A recovery is reflective of a continuing change in the research expenditure portfolio. That is, the distribution for sponsored research funding is changing as follows. Federal research funding has flattened in the last few years while non-Federal research awards have increased at a steady pace. Since the indirect cost rates for most Federal agencies are typically greater than the rates for non-federal sponsors, the overall growth in F&A recoveries has not kept pace with the overall growth in total research activity.

With the American Recovery and Reinvestment Act (ARRA) funding, the total F&A recovery increases significantly starting from the first quarter of FY2010.
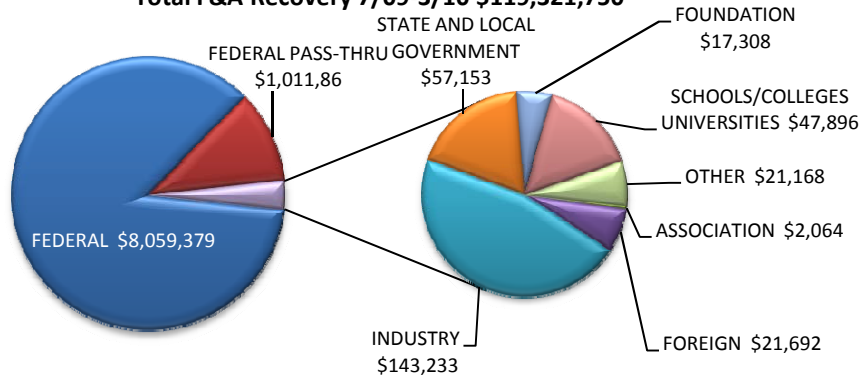
NEXT STEPS
None presently.

Note: MTDC (Modified Total Direct Costs) represents the 'base' which we use to calculate and apply the F&A rate. Each base (instruction, research, service and other direct institutional activities) includes all direct costs except: capital equipment, sub grant and contract in excess of $25,000, rental of facilities, patient care, tuition, capital expenditures (e.g., buildings), scholarship and stipends.
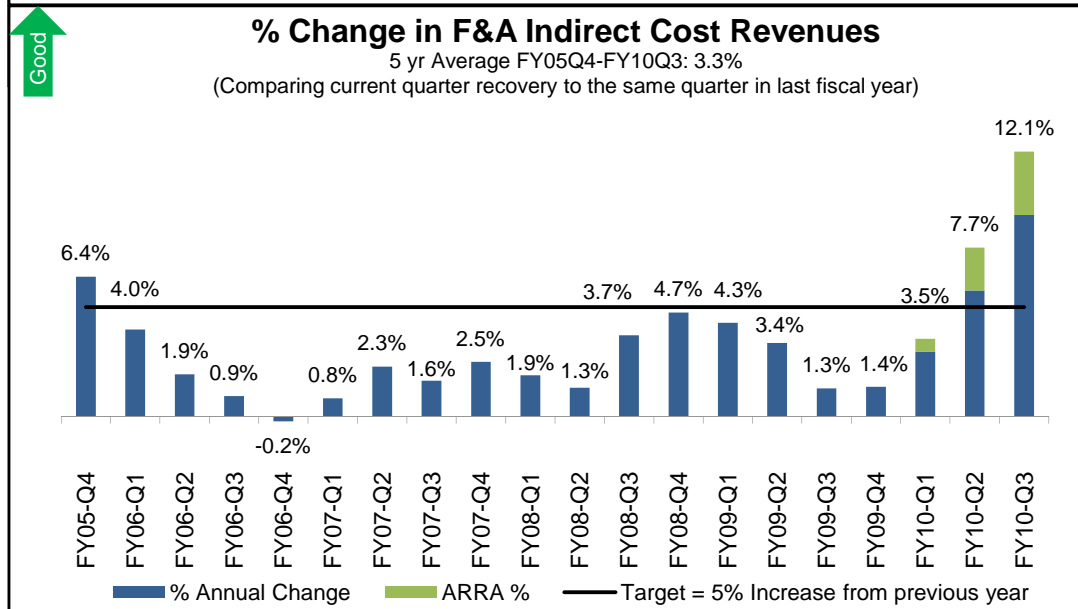
Report Contact: Jeanne Semura, semurj@u.washington.edu

Develop and Negotiate Indirect Cost Rates - RAA

Financial

DEFINITION
The Facilities and Administrative Cost Rate, or "F&A Rate", is a mechanism to reimburse the University for expenses incurred in providing facilities and administrative support to sponsored research and other sponsored projects. The F&A rate is essentially an overhead rate.

Increased F&A Recovery Resulting from Increased F&A Rate in Current Fiscal Year for On-Campus Research

Total Increased Recovery 7/09-3/10 $9,381,756

Total F&A Recovery 7/09-3/10 $119,321,750

FOUNDATION $17,308
STATE AND LOCAL
FEDERAL PASS-THRU GOVERNMENT
$1,011,86 $57,153
SCHOOLS/COLLEGES UNIVERSITIES $47,896
OTHER $21,168
ASSOCIATION $2,064
FEDERAL $8,059,379
INDUSTRY $143,233
FOREIGN $21,692

ANALYSIS
The increase in the negotiated F&A rate has resulted in significant additional recovery of F&A dollars related to on-campus research activity. For fiscal year ended March 31, 2010, there was about $9.4 million in increased F&A recovery for these awards. Cumulatively, 7/2005-03/2010, the increased F&A rates for on-campus research have generated slightly more than $24 million.

Increased F&A Recovery Resulting from Increased F&A Rate in Current Fiscal Year for On-Campus Research

Total Increased Recovery 7/05-3/10 $24,230,711
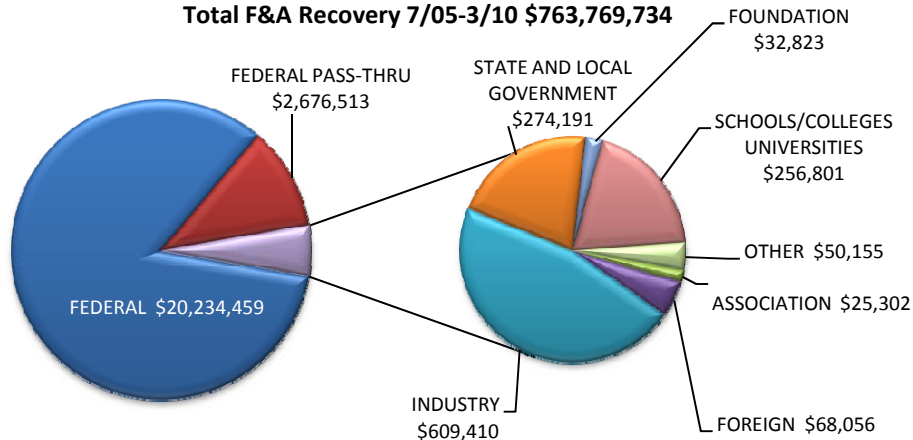
Total F&A Recovery 7/05-3/10 $763,769,734

FOUNDATION $32,823
FEDERAL PASS-THRU
$2,676,513
STATE AND LOCAL
GOVERNMENT
$274,191
SCHOOLS/COLLEGES UNIVERSITIES
$256,801
OTHER $50,155
ASSOCIATION $25,302
FEDERAL $20,234,459
INDUSTRY $609,410
FOREIGN $68,056

Chart reflects the increase in F&A revenue attributable to the F&A rate increase from the last F&A rate negotiation.

Charts reflects the increase in F&A revenue attributable to the F&A rate increase from the last F&A rate negotiation.
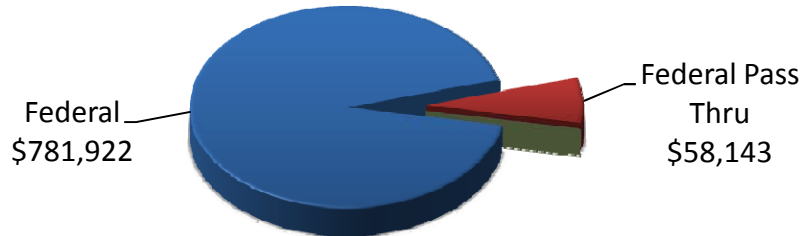
NEXT STEPS
None presently

Report Contact: Jeanne Semura, semurj@u.washington.edu

Develop and Negotiate Indirect Cost Rates - RAA

Financial

ARRA FUNDING
Increased F&A Recovery Resulting from Increased F&A Rate
in Current Fiscal Year for On-Campus Research
Total Increased Recovery 7/09-3/10 $840,065
Total F&A Recovery 7/09-3/10 $8,186,038

Federal
$781,922

Federal Pass
Thru
$58,143

Increased F&A Recovery Resulting from Increased F&A Rate
in Current Fiscal Year for On-Campus Research
Total Increased Recovery 7/05-3/10 $843,675
Total F&A Recovery 7/05-3/10 $8,278,177
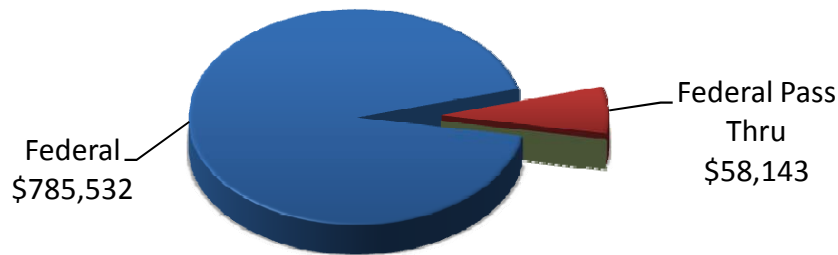
Federal
$785,532

Federal Pass
Thru
$58,143

Chart reflects the increase in F&A revenue attributable to the F&A rate increase from the last F&A rate negotiation.

DEFINITION
The Facilities and Administrative Cost Rate, or "F&A Rate", is a mechanism to reimburse the University for expenses incurred in providing facilities and administrative support to sponsored research and other sponsored projects. The F&A rate is essentially an overhead rate.

ANALYSIS
The increase in the negotiated F&A rate has resulted in significant additional recovery of F&A dollars related to on-campus research activity. Since July 2009, the university has received more than 440 awards from the American Recovery and Reinvestment Act (ARRA) totaling over $195 million in funding. For the first three quarters that ended in March 2010, there was approximately $840,650 in increased F&A recovery for these ARRA awards.
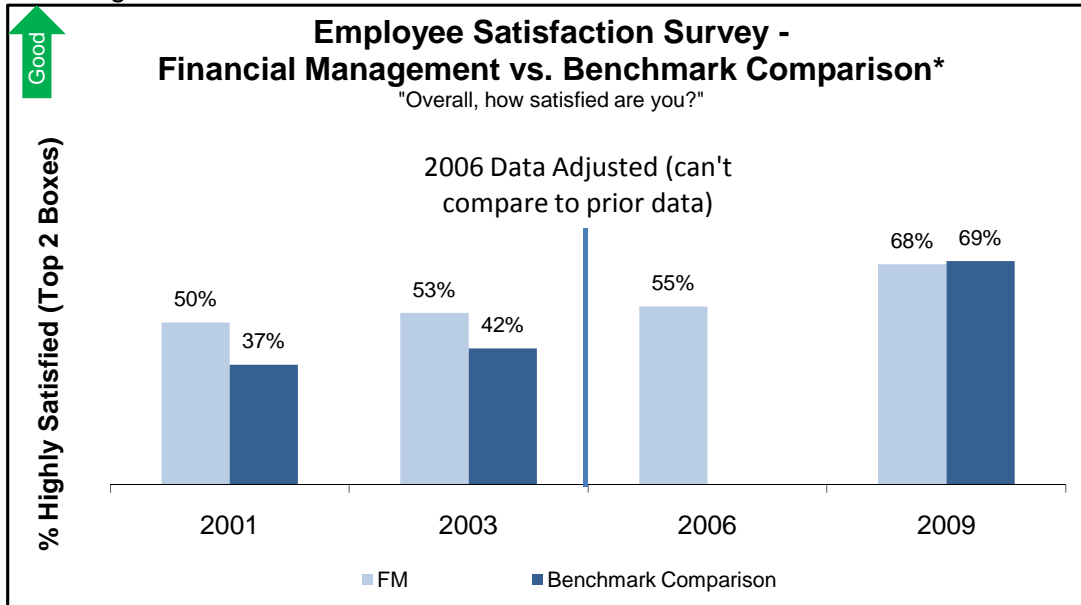
Charts reflects the increase in F&A revenue attributable to the F&A rate increase from the last F&A rate negotiation.

NEXT STEPS
None presently

Report Contact: Jeanne Semura, semurj@u.washington.edu

Develop staff - Percent of Staff Highly Satisfied with FM

Learning & Growth

Good ↑

Employee Satisfaction Survey -
Financial Management vs. Benchmark Comparison*
"Overall, how satisfied are you?"

% Highly Satisfied (Top 2 Boxes)

2006 Data Adjusted (can't compare to prior data)

- 2001: FM 50%, Benchmark Comparison 37%
- 2003: FM 53%, Benchmark Comparison 42%
- 2006: FM 55%
- 2009: FM 68%, Benchmark Comparison 69%

Legend: ■ FM ■ Benchmark Comparison

2009 FM Employee Satisfaction Survey
Overall Satisfaction by Department

% Overall Satisfaction

- C + C: 2006 (adjusted) 64%, 2009 60%
- Fin Acctg & Tax: 2006 (adjusted) 84%, 2009 92%
- Fin Svcs: 2006 (adjusted) 81%, 2009 76%
- Purchasing: 2006 (adjusted) 38%, 2009 49%
- RAA: 2006 (adjusted) 75%, 2009 76%
- SFS: 2006 (adjusted) 68%, 2009 79%
- Payroll: 2006 (adjusted) 72%, 2009 83%
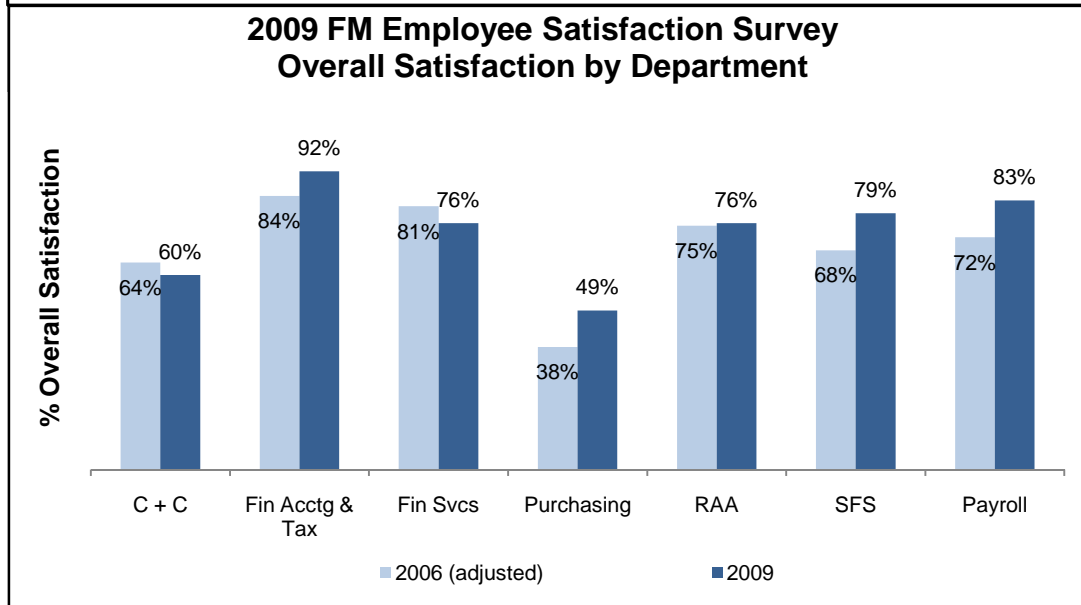
Legend: ■ 2006 (adjusted) ■ 2009

DEFINITION
Every three years, Financial Management retains an outside firm to conduct an extensive survey of its employees to measure overall job satisfaction. In 2009, the survey used a 5-point scale instead of 7-point scale in prior surveys. The percentage is for the top two boxes.

ANALYSIS
Job satisfaction of Financial Management employees in 2006 was adjusted to from a 7 point to a 5 point scale. In 2007, reorganization resulted in FM gaining two new areas: Purchasing and Creative Communications and losing Treasury, Risk Management, and Quality Improvement. More than 50% of the staff in FM today work in these two areas. In 2009, satisfaction is below the benchmark. FM is participating on a Finance & Facilities Team to improve communication division-wide.
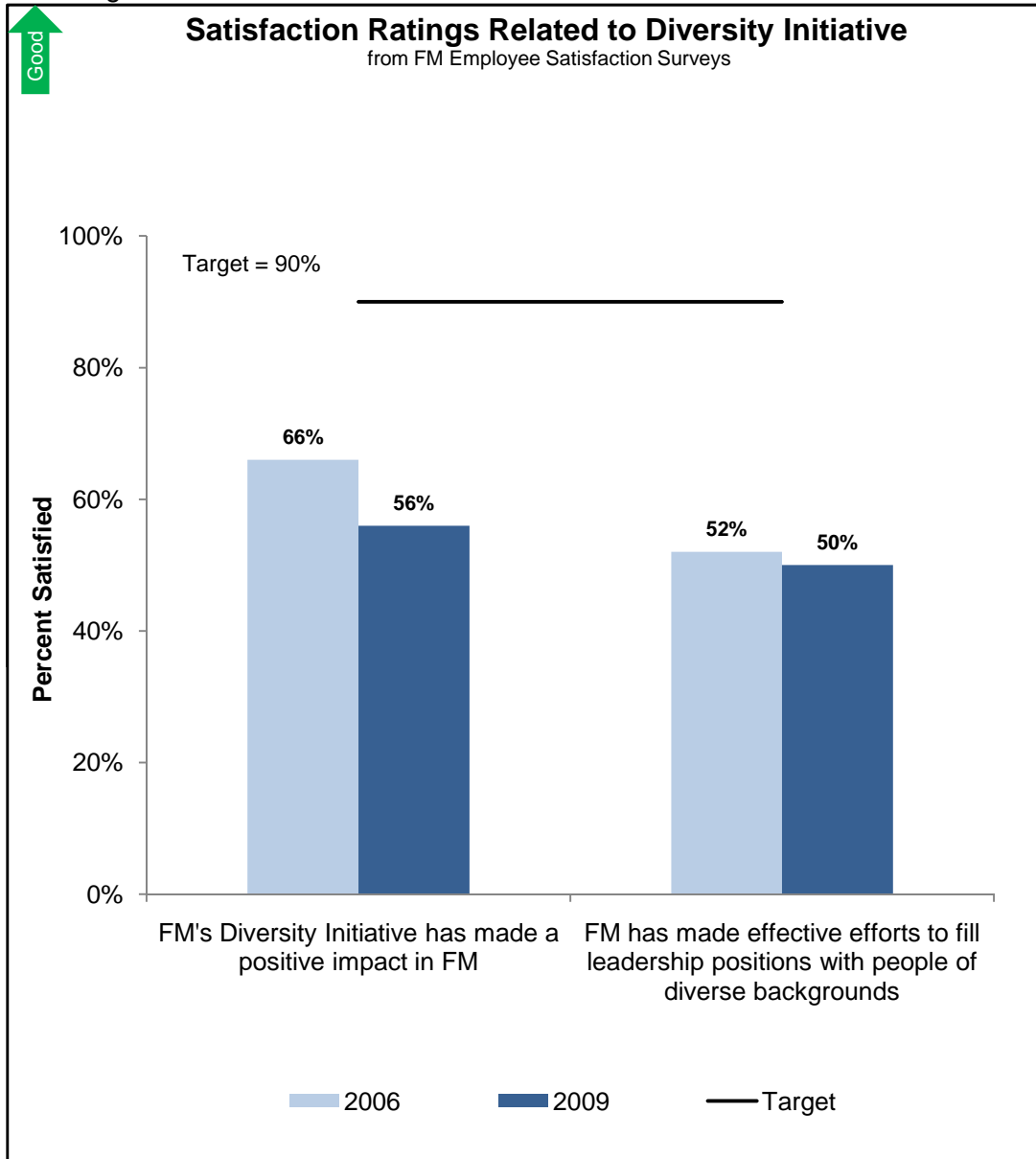
NEXT STEPS
Each department in the bottom graph are discussing the results to create action plans for improvement.
The next survey is scheduled for Spring 2012.

Report Contact: Jeanne Semura, semurj@u.washington.edu

Develop Staff - Diversity - FM

Learning & Growth

Satisfaction Ratings Related to Diversity Initiative
from FM Employee Satisfaction Surveys

Good

Target = 90%

100%

80%

66%

60%

56%

52%

50%

40%

20%

0%

Percent Satisfied

FM's Diversity Initiative has made a
positive impact in FM

FM has made effective efforts to fill
leadership positions with people of
diverse backgrounds

2006   2009   Target

DEFINITION
Financial Management retains an outside firm to conduct an extensive survey of its employees every three years. The percent is the combined score for "agree somewhat" and "agree strongly" on a 5-point scale.

ANALYSIS
The Diversity question was added in 2006. Reorganization in 2007 resulted in more than 50% addition of employees new to FM. The 2009 results provide a new baseline for improvement activities.

NEXT STEPS
Financial Management actively sponsors The Diversity Team which implements a variety of activities to increase awareness. One activity is the mentor program which solicits and matches managers with employees seeking mentor-mentee experiences.

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Develop Staff - Knowledge Workers - FM

Learning & Growth

Good ⬆

Satisfaction Ratings Related to Knowledge Worker Management Initiatives
from FM Employee Satisfaction Surveys

Target = 90%

Percent Satisfied

- I understand the concepts of knowledge work: 84% (2006), 80% (2009)
- I am developing my skills as a knowledge worker: 86% (2006), 73% (2009)

Legend: 2006 | 2009 | Target
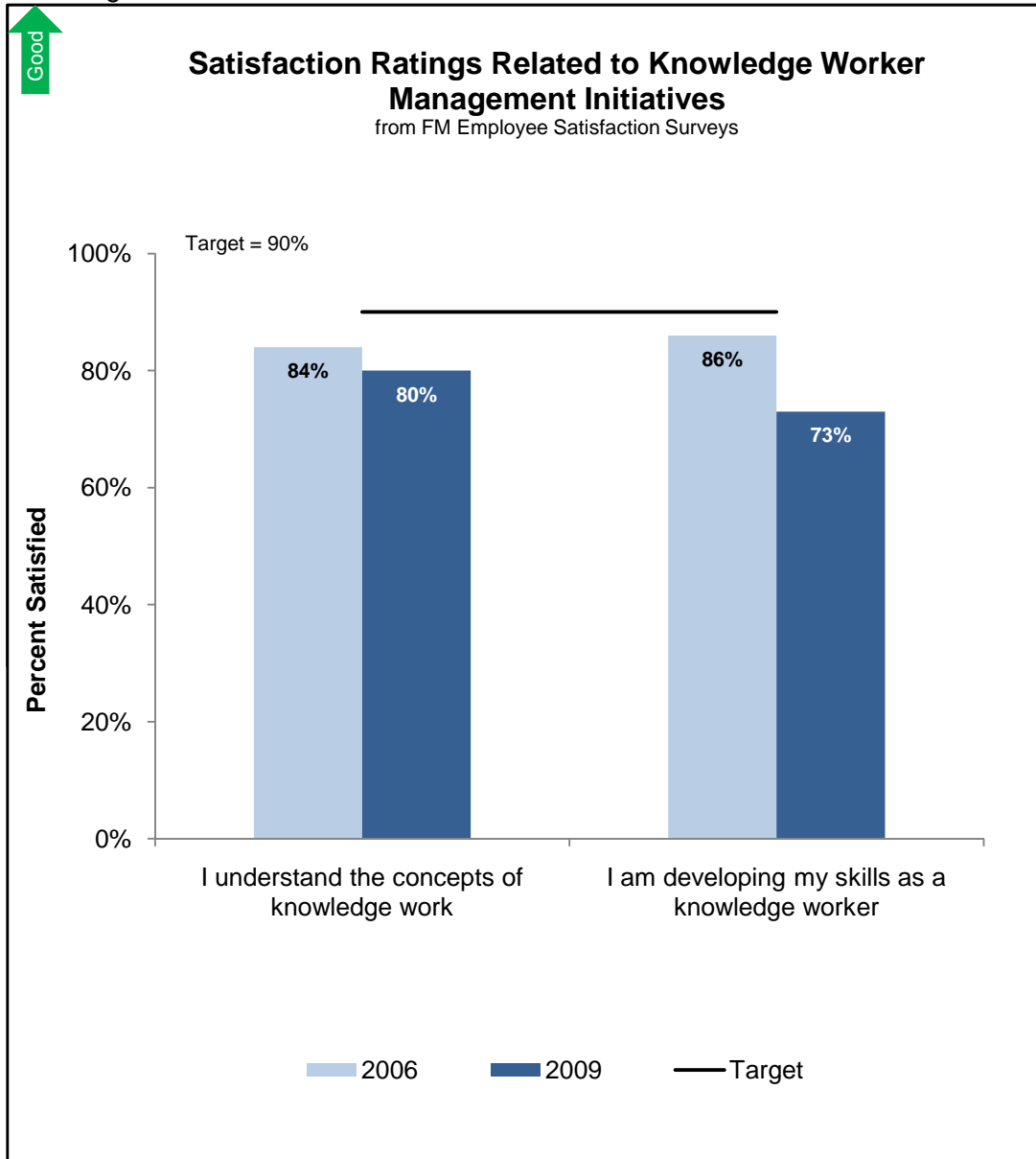
DEFINITION
The Knowledge Worker Initiative created a set of needed knowledge worker skills for each department. Employees are encouraged to include these in their Employee Development Plan.

ANALYSIS
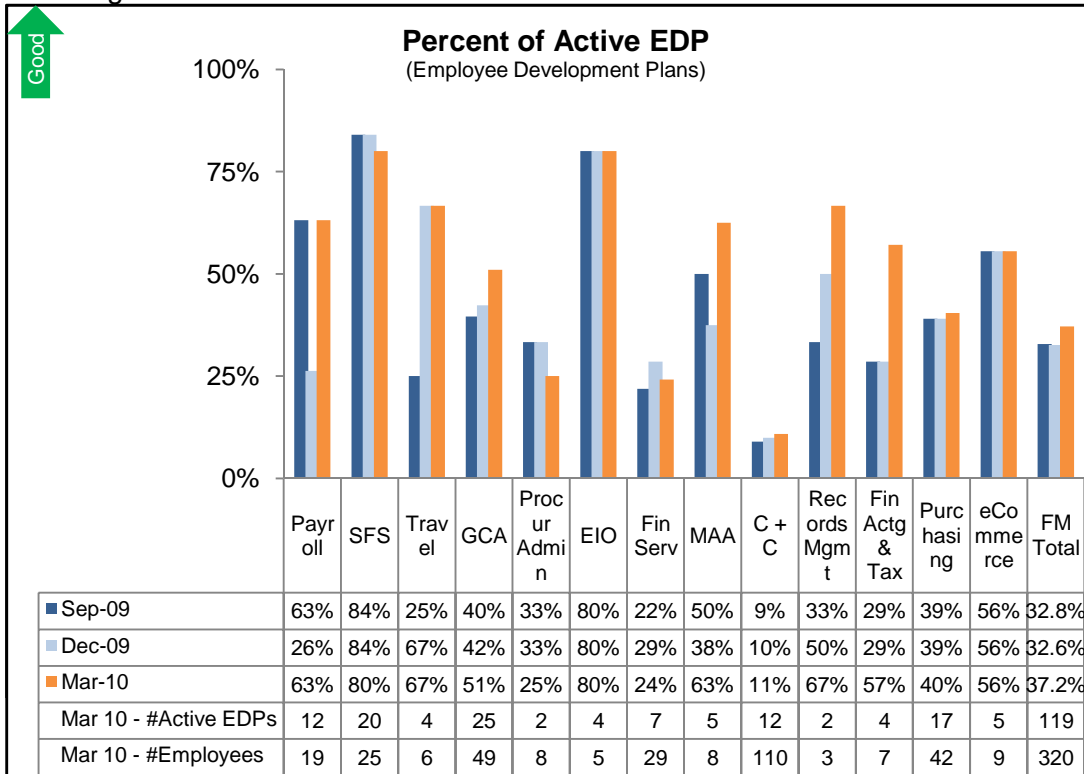In 2007, reorganization resulted in FM gaining two new areas: Purchasing and Creative Communications and losing Treasury, Risk Management, and Quality Improvement. More than 50% of the staff in FM today work in these two areas. In 2009, these scores provide a new baseline.

NEXT STEPS
Continue to encourage development of knowledge worker skills in employee development plans.

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Develop Staff - Active Employee Development Plans - FM

Learning & Growth

Good

Percent of Active EDP
(Employee Development Plans)

	Payroll	SFS	Travel	GCA	Procur Admin	EIO	Fin Serv	MAA	C + C	Records Mgmt	Fin Actg & Tax	Purchasing	eCommerce	FM Total
Sep-09	63%	84%	25%	40%	33%	80%	22%	50%	9%	33%	29%	39%	56%	32.8%
Dec-09	26%	84%	67%	42%	33%	80%	29%	38%	10%	50%	29%	39%	56%	32.6%
Mar-10	63%	80%	67%	51%	25%	80%	24%	63%	11%	67%	57%	40%	56%	37.2%
Mar 10 - #Active EDPs	12	20	4	25	2	4	7	5	12	2	4	17	5	119
Mar 10 - #Employees	19	25	6	49	8	5	29	8	110	3	7	42	9	320

Good

Percent of Active EDP for FM All

DEFINITION
Measures the percentage of active Employee Development Plans (EDPs) approved and on-file. Plans must be renewed and approved every two years to remain active.

ANALYSIS
Overall, there are 119 employees with active plans (37.2%). There were significant increases in GCA/MAA, and in Financial Accounting numbers of active EDPs.

Second quarter 2010 measures will show the reorganization of Procurement Services; we will not restate the prior periods.

FM overall trend shows almost 10% increase in the last year.

NEXT STEPS
Managers continue to encourage all staff to complete or reactivate their EDPs. More targeted EDP workshops are scheduled in Procurement Services.

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