University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, January 2, 2020
Time: 2:00 – 3:00 p.m.
Location: Hyer Hall Conference Room 142

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	*New Purchase Request and Change Order Forms* have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A *Procurement Process training video* was also created as a quick educational resource around purchasing best practices. *Purchasing Tests* are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	*Policy News and Updates webpage*, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. *Practice Directives and Procedures webpage*, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. *Presenting information about Practice Directives and Procedure project* at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a variety of different informational topics including compliance-related best practices and other scenarios.

Contact the Quality Assurance Improvement Manager with any questions, concerns, and/or feedback via telephone at (262) 472-1772 or email at stokesa@uww.edu

1

		Ongoing.
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	In Progress.

3. Discussion
    a. PIAT Impact & Showcase – Grace Crickette.
    b. Waste Bin Reduction Project Update – Wes Enterline.
    c. Green Cleaning Project Update – Josh Filer.
    d. Professional Development and Tuition Reimbursement Call for Participation.

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University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, January 16, 2020
Time: 2:00 – 3:00 p.m.
Location: Hyer Hall Conference Room 142

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	In Progress.

3. Discussion
   a. Green Toilet Paper – Josh Filer.
   b. Workgroups – Process Improvement & Spending.
      i. <u>Professional Development and Tuition Reimbursement.</u>
         Goals: Develop clear procedures in support of greater equity, oversight, tracking, and strategic spending behaviors.
      ii. <u>Transactional Hub.</u>
         Goals: Centralize targeted transactional operations into hubs to reduce unnecessary spending, staff time, fraud and/or error. Ensure greater compliance with policies and audit recommendations.
      iii. <u>Events, Food, Beverages, and Catering.</u> *
         Goals: Establish clear, consistent expectations around appropriate use of food and beverages for business meetings and official functions. Greater compliance/justifiable expenses, and strategic spending behaviors.
      iv. <u>Travel.</u> *
         Goals: Strategic use and spending.
      v. <u>IT Software and Hardware.</u> *
         Goals: Contracts strategy, reduce, reuse, repurpose hardware.

* PIAT-specific workgroups.

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University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, January 30, 2019
Time: 2:00 – 3:00 p.m.
Location: Hyer Hall Conference Room 142

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	***New Purchase Request and Change Order Forms*** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A ***Procurement Process training video*** was also created as a quick educational resource around purchasing best practices. ***Purchasing Tests*** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	***Policy News and Updates webpage***, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. ***Practice Directives and Procedures webpage***, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. ***Presenting information about Practice Directives and Procedure project*** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	In Progress.

3. Discussion
   a. Workgroups – Process Improvement & Spending Updates.
      i. <u>Professional Development and Tuition Reimbursement.</u>
         Goals: Develop clear procedures in support of greater equity, oversight, tracking, and strategic spending behaviors.
         Status: First meeting next week.

      ii. <u>Transactional Hub.</u>
         Goals: Centralize targeted transactional operations into hubs to reduce unnecessary spending, staff time, fraud and/or error. Ensure greater compliance with policies and audit recommendations.
         Status: Whitepaper being drafted. Final meeting next week.

      iii. <u>Events, Food, Beverages, and Catering.</u> *
         Goals: Establish clear, consistent expectations around appropriate use of food and beverages for business meetings and official functions. Greater compliance/justifiable expenses, and strategic spending behaviors.
         Status: First of three spend analytics projects. Will begin deeper dive today on this topic.

      iv. <u>Travel.</u> *
         Goals: Strategic use and spending.
         Status: Not started. Second of three spend analytics projects.

      v. <u>IT Software and Hardware.</u> *
         Goals: Contracts strategy, reduce, reuse, repurpose hardware.
         Status: Not started. Third of three spend analytics projects.

* PIAT-specific workgroups.

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University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, February 13, 2019
Time: 2:00 – 3:00 p.m.
Location: Hyer Hall Conference Room 142

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	*New Purchase Request and Change Order Forms* have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A *Procurement Process training video* was also created as a quick educational resource around purchasing best practices. *Purchasing Tests* are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	*Policy News and Updates webpage*, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. *Practice Directives and Procedures webpage*, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. *Presenting information about Practice Directives and Procedure project* at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	In Progress.

3. Discussion
   a. Green Toilet Paper Project Update – Josh Filer.
   b. Workgroups – Organized Through Cabinet.
      i. Transactional Hub.
         Goals: Centralize targeted transactional operations into hubs to reduce unnecessary spending, staff time, fraud and/or error. Ensure greater compliance with policies and audit recommendations.
         Status: This workgroup meeting series has ended. Draft whitepaper to be reviewed and finalized.

      ii. Professional Development and Tuition Reimbursement.
         Goals: Develop clear procedures in support of greater equity, oversight, tracking, and strategic spending behaviors.
         Status: Information gathering and drafting whitepaper. Additional time is needed to further explore, so future meetings will be scheduled.

   c. Workgroups – Spikes Cavell.
      i. Project Overview – Updated Structure and Timeline.
         • Sign Up Sheet
         • Roadmap and Instructions
         • PIAT Project Work Form

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2

PIAT Showcase Overview

Date: Tuesday, February 25, 2020
Time: 11:00 a.m. to 1:00 p.m.
Location: UC Old Main Ballroom

Agenda

1. Welcome and Introduction – Grace Crickette.
2. Panel/Question & Answer Session – Wes Enterline, Todd Carothers, and Josh Filer.
3. Activities.
   a. Zone 1: Operational Excellence Video.
   b. Zone 2: 6 Thinking Hats Game.
   c. Zone 3: Quick Survey - Electronic Forms List.
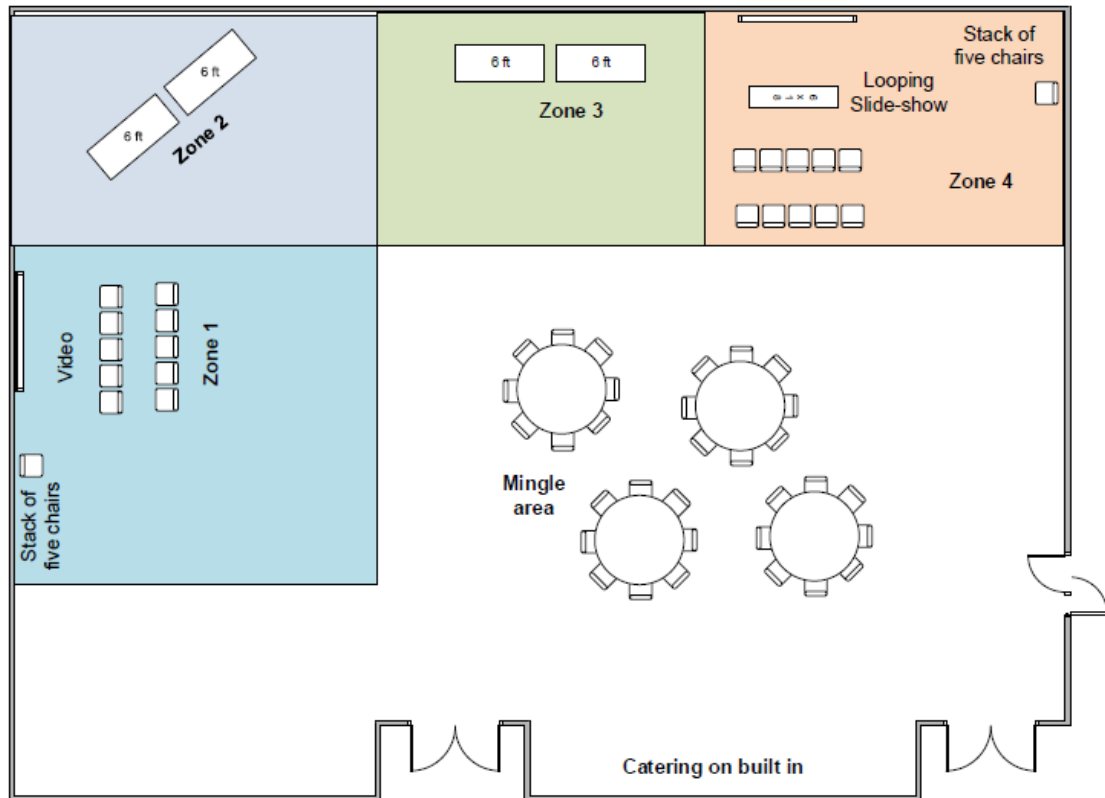   d. Zone 4: PIAT Slide Deck, Resources, and Sign-Up Table.

Layout

Room: Old Main Ballroom/275
Event: Admin Affairs PIAT Meet and Greet
Headcount: 100
Date: Tuesday, February 25, 2020
Time: 10:30AM/11:00AM-1:00PM/1:15PM

Zone 1: Operational Excellence Video.

At the heart of our operational excellence is the Process Improvement Advisory Team (PIAT). This video was shared during the [UW System Board of Regents Meeting hosted at UW-Whitewater this last December](#), and provides a high-level overview of process efficiencies and cost containment highlights focused on incremental change.

Zone2: 6 Thinking Hats Game.

Objective: This exercise demonstrates the collaborative spirit of PIAT using humor. After all, you can't spell "improvement" without "improv"!

Background: Participants will be pitched UW-Whitewater-focused "pretend ideas" for this exercise. For example, "Wouldn't it be fun to have our 'mascot' live on campus? What if we adopted a real, live hawk as our campus 'pet'?"

Execution: Attendees will be pulled, on a rotating basis, from the audience to participate in this exercise while others can watch and enjoy. Each participant will select one of 6 different, silly labeled hats for the improv exercise. Each hat represents a unique set of priorities and perspectives, for the role they are playing:

Hat	Role	Focus
(blue hat)	Logic	The facts.
(yellow hat)	Optimism	The value and the benefits.
(black hat)	Devil's advocate	The difficulties and dangers.
(red hat)	Emotion	Feelings and intuitions.
(green hat)	Creativity	Possibilities and new ideas
(purple hat)	Management	Making sure the rules of the hats are observed.

For example, if you're wearing the "Devil's Advocate" hat, it is your job to consider the idea's limitations and challenges – "Aren't hawks kind of dangerous? Don't you need special training to handle them in domestic settings?"

Zone 3: Quick Survey – Electronic Forms List.
Attendees will have an opportunity to voice their "Top 3" recommended forms/processes for BP Logix, an electronic workflow, using dot stickers. There will also be an area for people to write down additional forms they would like to see recreated in an e-workflow format.

Zone 4: PIAT Slide Deck, Resources, and Sign-Up Table.
This PowerPoint provides a general overview of our PIAT process, methodology, and examples. Attendees can watch the slide deck rotate and use the sign-up sheet to indicate interest in joining us at a future PIAT meeting. Printed resources will also be available for reference.

University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, February 27, 2019
Time: 2:00 – 3:00 p.m.
Location: Hyer Hall Conference Room 142

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	In Progress.

3. Discussion
   a. PIAT Showcase Overview – Alexandra Stokes.
   b. Inventory Management Plan & Surplus Sale Update – Josh Filer.
   c. Workgroups – Organized Through Cabinet.
      i. Transactional Hub.
         No further actions at this time.
      ii. Transactional Hub.
         Google Drive established and monthly meeting series scheduled.
   d. Spikes Cavell Workgroups.
      i. Project Update.
   e. Budget Website and PIAT Ideas Intake Form.

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2

University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, March 12, 2020
Time: 2:00 – 3:00 p.m.
Location: Hyer Hall Conference Room 142

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	In Progress.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	In Progress.
9	Transactional Hub (Workgroup scheduled through Cabinet).	In Progress.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.

3. Discussion
    a. Process Improvement Collaborations.
        i. ITSCM 410
            - Student Fee Appeal Request Process
            - Prizes, Gifts and Awards Process
            - Student-Faculty Account Application/Check Process
            - Transfer Request Form Process
    b. BP Logix and E-Workflows.
    c. Outside Activities Reporting (OAR) Process.
    d. Spikes Cavell Spend Analytics Workgroups.
        i. Project Update.
    e. Budget Website and PIAT Ideas Intake Form.

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University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, March 26, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	*New Purchase Request and Change Order Forms* have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A *Procurement Process training video* was also created as a quick educational resource around purchasing best practices. *Purchasing Tests* are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	*Policy News and Updates webpage*, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. *Practice Directives and Procedures webpage*, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. *Presenting information about Practice Directives and Procedure project* at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	In Progress.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	In Progress.
9	Transactional Hub (Workgroup scheduled through Cabinet).	In Progress.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.

3. Discussion
   a. Challenges with COVID-19.
      i. Questions, Concerns, or Comments regarding processes or procedures?
   b. BP Logix and E-Workflows.
   c. Outside Activities Reporting (OAR) Process.
   d. Spikes Cavell Spend Analytics Workgroups.
      i. Project Update.
   e. Budget Website and PIAT Ideas Intake Form.

Contact the Quality Assurance Improvement Manager with any questions, concerns, and/or feedback via telephone at (262) 472-1772 or email at stokesa@uww.edu

![University of Wisconsin Whitewater logo]

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, April 9, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	In Progress.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	In Progress.
9	Transactional Hub (Workgroup scheduled through Cabinet).	In Progress.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.
12	Spikes Cavell Spend Analytics Workgroups.	In Progress.

3. Discussion
    a. Challenges with COVID-19.
        i. Questions, Concerns, or Comments regarding processes or procedures?
        ii. Hiring procedure adjustments.
        iii. Web resources & surveys.
    b. BP Logix and E-Workflows.
    c. Budget Website and PIAT Ideas Intake Form.
    d. Community Connections Web Content.

Contact the Quality Assurance Improvement Manager with any questions, concerns, and/or feedback via telephone at (262) 472-1772 or email at stokesa@uww.edu

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Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, April 23, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	On Hold.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	On Hold.
9	Transactional Hub (Workgroup scheduled through Cabinet).	On Hold.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.
12	Spikes Cavell Spend Analytics Workgroups.	In Progress.

3. Discussion
   a. Challenges with COVID-19.
      i. Web resources & surveys.
   b. PIAT Ideas Intake Form.
   c. BP Logix Update.
   d. Tuition Reimbursement and Professional Development Workgroup Update.

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Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, May 7, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	*New Purchase Request and Change Order Forms* have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A *Procurement Process training video* was also created as a quick educational resource around purchasing best practices. *Purchasing Tests* are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	*Policy News and Updates webpage*, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. *Practice Directives and Procedures webpage*, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. *Presenting information about Practice Directives and Procedure project* at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	On Hold.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	On Hold.
9	Transactional Hub (Workgroup scheduled through Cabinet).	On Hold.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.
12	Spikes Cavell Spend Analytics Workgroups.	In Progress.

3. Discussion
   a. Challenges with COVID-19.
      i. Web resources update.
   b. BP Logix Update.
   c. PIAT Ideas Intake Form – Project Time.

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University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

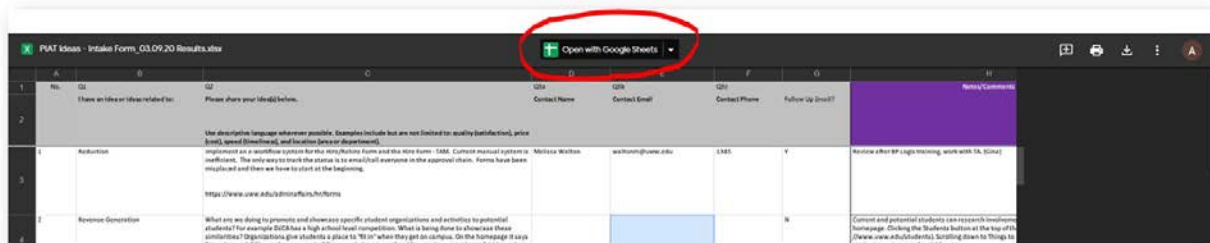Date: Thursday, May 21, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

Greetings!

As some of you may already know, I am currently wrapping up BP Logix Boot Camp so we can start automating some processes and forms on campus (Woohoo!). Since I am in a training session during our regular scheduled meeting time, I would like you to work on the following assignment:

Assignment

A few of you have already gone into the PIAT Ideas - Intake Form_03.09.20 Results.xlsx and started adding calls to action, identifying SMEs, volunteering to work on certain project ideas, sharing notes, recommendations and other feedback, but alas, many of you have not! Please use our time today to work on this project. **When you open the hyperlink above, make sure you click on the "Open with Google Sheets" button at the top of the page, so you can make edits in the document (See Red Circle below).**

As a reminder, the bigger picture goal is to start creating workgroups so we can execute on the survey results that have potential value as improvement projects (Note: "value" can equate to efficiencies, dollar savings, or user satisfaction). I will review our progress next week, and may begin assigning people to certain projects.

Feel free to contact me with any questions!

Kind regards,

Alexandra Stokes

Contact the Quality Assurance Improvement Manager with any questions, concerns, and/or feedback via telephone at (262) 472-1772 or email at stokesa@uww.edu

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Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, June 4, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	On Hold.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	On Hold.
9	Transactional Hub (Workgroup scheduled through Cabinet).	On Hold.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.
12	Spikes Cavell Spend Analytics Workgroups.	In Progress.

3. PIAT Ideas Intake Form – Project Time.
    This will be a working meeting where we assess the recommendations made in the Budgeting a Stronger Future survey, identify projects we can begin working on, and assign work groups.

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University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, June 18, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	On Hold.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	On Hold.
9	Transactional Hub (Workgroup scheduled through Cabinet).	On Hold.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.
12	Spikes Cavell Spend Analytics Workgroups.	In Progress.

3. Project Idea Discussion – Josh Filer.
4. Project Work – Should UW-W divest in prison labor?
    a. Fill out Intake form: Gather notes concerning policies, SMEs, and spend analytics.

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University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, July 2, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	On Hold.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	On Hold.
9	Transactional Hub (Workgroup scheduled through Cabinet).	On Hold.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.
12	Spikes Cavell Spend Analytics Workgroups.	In Progress.

3. Project Work – Prison Labor Analysis.
    a. Review and update Intake form: Continue to gather notes concerning policies, SMEs, and spend analytics.

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2

University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, July 16, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	On Hold.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	On Hold.
9	Transactional Hub (Workgroup scheduled through Cabinet).	On Hold.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.
12	Spikes Cavell Spend Analytics Workgroups.	In Progress.

3. Project Work – Prison Labor Analysis.
    a. Spend Analytics data review and assessment. Begin drafting Whitepaper summary.

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Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, July 30, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	On Hold.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	On Hold.
9	Transactional Hub (Workgroup scheduled through Cabinet).	On Hold.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.
12	Spikes Cavell Spend Analytics Workgroups.	In Progress.

3. Project Work – Prison Labor Analysis.
   a. Finalize Whitepaper summary, and organize supporting documentation.

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University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, August 13, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	*New Purchase Request and Change Order Forms* have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A *Procurement Process training video* was also created as a quick educational resource around purchasing best practices. *Purchasing Tests* are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	*Policy News and Updates webpage*, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. *Practice Directives and Procedures webpage*, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. *Presenting information about Practice Directives and Procedure project* at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	On Hold.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	On Hold.
9	Transactional Hub (Workgroup scheduled through Cabinet).	On Hold.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.
12	Spikes Cavell Spend Analytics Workgroups.	In Progress.

3. New PIAT Structure – Overview and Presentation.
   a. Revisit PIAT background and purpose.
   b. Highlight top accomplishments.
   c. Introduce new Work Group Team and Advisory Team structure.
   d. Share Draft Charter and discuss expectations.

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Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, August 27, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.

2. Project List At-A-Glance.

	Description	Status
1	REQ to PO Tracking & Timelines.	**New Purchase Request and Change Order Forms** have been finalized, which include clear definitions of purchasing types and scenarios to help reduce the number of submission errors and confusion around the purchasing process. A **Procurement Process training video** was also created as a quick educational resource around purchasing best practices. **Purchasing Tests** are also being developed for buyers and approvers to check their knowledge of purchasing best practices. **Ongoing.**
2	Policies & Procedures Education and Transparent Leadership.	**Policy News and Updates webpage**, which includes Policy Status Updates document, News Releases, link to subscribe to the UW System Policy RSS newsfeed, and a list of most recent policies under review and open for comment. **Practice Directives and Procedures webpage**, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. **Presenting information about Practice Directives and Procedure project** at onboarding trainings, and other meetings. **Ongoing.**
3	Training Videos.	Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a

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		variety of different informational topics including compliance-related best practices and other scenarios. **Ongoing.**
4	Digital On-Campus Swap Shop.	In Progress.
5	The Great Clean Up.	In Progress.
6	"Schwag" Purchasing Trade Show.	On Hold.
7	Direct Deposit Requirement for Student Refunds.	In Progress.
8	Green Toilet Paper.	On Hold.
9	Transactional Hub (Workgroup scheduled through Cabinet).	On Hold.
10	Tuition Reimbursement and Professional Development (Workgroup scheduled through Cabinet).	In Progress.
11	Process Improvement Collaborations with ITSCM 410: • Student Fee Appeal Request Process • Prizes, Gifts and Awards Process • Student-Faculty Account Application/Check Process • Transfer Request Form Process	In Progress.
12	Spikes Cavell Spend Analytics Workgroups.	In Progress.

3. New PIAT Structure
    a. Updated language – Charter, Summary, and Presentation.
    b. Updated website.
    c. Questions.
4. Work Group Meeting
    a. Connect with Work Group Team and discuss goals, timelines, and next steps.

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University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: RESCHEDULED (Conflict with University Town Hall) Tuesday, September 15, 2020
Time: 10:00 – 11:00 a.m.
Location: WebEx Meeting

1. Introductions.
2. Project Management Plan and Goals.
   a. Projects Master List in Progress.
   b. Tools.
      i. Process Mapping & Visio.
3. Tuition Reimbursement & Professional Development Project.
   a. Background Information on Work Group.
   b. Progress to Date.
4. Action Items.
   a. Download Visio.
   b. Create Mock Process Map for Practice.
   c. Review Tuition Reimbursement & Professional Development resources in PIAT Google Shared Drive.

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University of Wisconsin Whitewater

Process Improvement Advisory Team (PIAT) Agenda

Date: Thursday, September 24, 2020
Time: 2:00 – 3:00 p.m.
Location: WebEx Meeting

1. Introductions.
2. Visio Status Check In.
   a. Mock Process Map Review.
3. Projects Master List can be found on PIAT Google Shared Drive.
4. Project Review and Assignment.

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