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.


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| 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 |
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

### 2. Variety of Different Informational Topics

- **Digital On-Campus Swap Shop.** Ongoing.
- **The Great Clean Up.** In Progress.
- **“Schwag” Purchasing Trade Show.** In Progress.

### 3. Discussion

#### a. Workgroups – Process Improvement & Spending Updates.

1. **Professional Development and Tuition Reimbursement.**
   - Goals: Develop clear procedures in support of greater equity, oversight, tracking, and strategic spending behaviors.
   - Status: First meeting next week.

2. **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: Whitepaper being drafted. Final meeting next week.

3. **Events, Food, Beverages, and Catering.**
   - 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.

4. **Travel.**
   - Goals: Strategic use and spending.
   - Status: Not started. Second of three spend analytics projects.

5. **IT Software and Hardware.**
   - Goals: Contracts strategy, reduce, reuse, repurpose hardware.
   - Status: Not started. Third of three spend analytics projects.

* PIAT-specific workgroups.