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.


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<tr>
<th>Description</th>
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<tr>
<td>1. REQ to PO Tracking &amp; Timelines</td>
<td><em>New Purchase Request and Change Order Forms</em> 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 <em>Procurement Process training video</em> was also created as a quick educational resource around purchasing best practices. <em>Purchasing Tests</em> are also being developed for buyers and approvers to check their knowledge of purchasing best practices. <strong>Ongoing.</strong></td>
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<td>2. Policies &amp; Procedures Education and Transparent Leadership.</td>
<td><em>Policy News and Updates webpage</em>, 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. <em>Practice Directives and Procedures webpage</em>, which includes access to finalized Practice Directives on a variety of topics. This project is ongoing. <em>Presenting information about Practice Directives and Procedure project</em> at onboarding trainings, and other meetings. <strong>Ongoing.</strong></td>
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<td>3. Training Videos.</td>
<td>Animated training videos are created and uploaded to our website on a continuous basis to offer convenient access to a</td>
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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
variety of different informational topics including compliance-related best practices and other scenarios.

Ongoing.

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<th>Digital On-Campus Swap Shop.</th>
<th>In Progress.</th>
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3. Discussion
   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