**Shared Services Highlight:
Travel Management Services with IUC-PG**

Inter-University Council of Ohio
Shared Services Summit

Travel Services Background

- Governor's Task Force on Affordability and Efficiency
  - October 1, 2015 Report
    - Report focused on 6 areas for Strategic Procurement for IUC-PG and its members.
    - Travel Services was one area from this Report.
  - Consultant assistance in 2016-17 to review current state of travel at each IUC-PG public university
  - Initial IUC-PG plan was revised in June 2017 and submitted to Ohio Dept of Higher Education.

State of Travel 2016-17

- Review of "current state" for 14 public universities by consultant.
- Conclusions:
  - There are a variety of systems and approaches among the 14 public universities.
  - Duty of Care is an important Risk area that could use improvements (added to RFP as a key component)
  - Establishing a universal, automated system will help gather data to gain IUC-PG member discounting on travel areas such as airfare and hotels.
  - Not all IUC-PG member institutions need an automated Travel Management System.

TRAVEL ASSESSMENT EXECUTIVE SUMMARY
IUC MEMBERS CURRENT STATE SUMMARY

A snapshot of the current state overview for each of the 14 IUC member institutions demonstrates that universities are at varying stages for each step of the travel and expense life cycle.

Description	Bowling Green	Central State	Cleveland State	Kent State	NEOMED	Shawnee State	Ohio State	U. Akron	U. Toledo	Youngstown	Ohio Uni.	U. Cinci.	Miami U.	Wright State
Total Travel Spend	$5,167	$434	$5,665	$7,249	$1,130	$564	$73,014	$7,651	$6,341	$2,081	$10,677	$24,000	$4,611	$3,353
Travel Manager	-	-	-	-	-	-	Yes	-	-	Yes	-	Yes	-	-
Travel and Expense Authorization Processes														
Travel Authorization Process	Paper; Varies by Dept.; No Mandate	PDF Form; Mandated Uni Wide	Paper/Also in SciQuest; Mandated Uni-Wide	Paper; Varies by Dept.; No Mandate	Paper; Varies by Dept.; No Mandate	Paper Approval; Uni. Wide; No Mandate	Workflow In System (eTravel); Uni.-Wide	Paper; Varies by Dept.; No Mandate	Paper; Varies by Dept.; No Mandate	Workflow in Concur; Mandated Uni-Wide	Paper; Varies by Dept.; No Mandate	Paper Now / Moving to Concur; Uni-Wide	Paper; Varies by Dept.; No Mandate	PDF Form; Mandated Uni-Wide
Travel Contracts and Technologies														
Airline	-	-	-	United	-	-	Southwest	-	-	-	Delta/Amer.	-	Delta	-
Lodging	Local Hotels	-	-	Local Hotels	-	Local Hotels	General Discounts	Local Hotels	Local Hotels	In Progress	Local / TMC Gov't Rates	Local Hotels	-	Local Hotels
Car Rental	IUC-PG National / Enterprise Rental Car Agreement - Utilized by All IUC Member Institutions													
TMC	Altour	-	-	Traveline / Uniglobe	-	-	CTP / Uniglobe	-	-	Traveline	Altour	AAA	Options Travel	Altour
OBT	Concur (TMC)	-	-	Concur (TMC)	-	-	Concur (TMC)	-	-	Concur	Concur	Concur	Concur (TMC)	Concur (TMC)
Expense Tool	Chrome River	-	Paper / SciQuest	Homegrown / RFP'ing	-	Oracle Fusion (July)	Homegrown (eTravel)	-	Banner Ellucian	Concur	Concur	Concur	Banner Ellucian	Chrome River (April)
Duty of Care														
Duty of Care Program	Not Official; TMC / Card	-	-	Not Official; TMC Report	-	Not Official; Pre-Trip Approval	Not Official; TMC/eTravel System	Not Official; Self-Reporting	-	Not Official; TMC Report	TMC/Pre-Trip Approval; Int'l Study Program	AAA/Concur Pre-Trip Approval	Not Official; TMC / Finance	-
Expense Reimbursement														
Card provider	JPMC	JPMC	JPMC	JPMC	JPMC	JPMC	PNC	JPMC	JPMC	JPMC	JPMC	B of A	JPMC	JPMC
Payment Preference	Prefers Own Card Use	Prefers One-Card Use for Travel	Prefers One-Card Use for Travel	Prefers Own Card Use	Prefers One-Card Use for Travel	Prefers One-Card Use for Travel	TBD	Prefers One-Card Use for Travel	TBD	Prefers T-Card Use for Travel	Mandated One-Card Use for Travel	Prefers T-Card Use for Travel	Prefers T-Card Use for Travel	Prefers One-Card Use for Travel
Expense Reimb. Process	In Chrome River; Workflow Approval	Excel Form; Paper Receipts and Approval Process	Paper; SciQuest Workflow; Scanned Receipts	Workflow in Homegrown System; Paper Receipts	Paper Form, Paper Receipts; Manual Approvals	Paper Now / Oracle Fusion in July 2017	eTravel System Workflow; Scanned Receipts	Excel Form; Paper Receipts and Approval Process	In Ellucian; Workflow Approval	In Concur; Workflow Approval	In Concur; Workflow Approval	Pilot Group In Concur; Workflow Approval; Some Paper	In Ellucian; Workflow Approval	Paper Now / Chrome River in Sept. 2017

Stage 1: Challenged	Stage 2: Basic	Stage 3: Intermediate	Stage 4: Advanced	Stage 5: Leading

Source: Information gathering through interviews with each IUC-PG institution.

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Inter-University Council of Ohio

Updated Travel Services Action Plan (2017)

- The new plan included:
  - All IUC-PG public members have a travel policy at their institution
    - Each member to consider utility of centralized, automated travel system for cost reduction
    - Each member will share travel policy information as needed for collective knowledge
  - IUC-PG shall collect data to identify short-term opportunities for travel savings (underway with new Travel Management Company)
  - IUC-PG shall establish a Price Agreement with a Travel Management Company for voluntary member use
    - RFP in 2018
    - Participating universities: Bowling Green State University, Ohio University, and University of Toledo; Also extends to ANY IUC-PG member

Goals of the Travel Management RFP

- Competitive Procurement

- Savings

- Duty of Care

- Easier Management of Travel Services for Members

Outcome of Travel RFP

- Single vendor award: Christopherson Travel
  - Nationally ranked Travel Management Company (TMC) with strong track record in higher education.
  - Concur Preferred Partner, but can integrate other expense management systems
  - Focus on keeping up to date with technology
- Savings
  - Pricing allows for variety of use cases by members (a la carte → full management)
  - Transaction and Program level savings for those who currently have a TMC
- Duty of Care
  - SecurityLogic tool (created by Christopherson) tracks travelers in real-time and pushes alerts to managers and travelers via text and email.
  - Christopherson feeds to multiple (Member must choose) third party risk management and extraction services.
- Easier Travel Management
  - Single fee travel management (booking fee) with unlimited # of follow up calls
  - Partnership with Christopherson to serve the needs of the campus community

Types of Travel Covered

- General Travel Services (Agent or Online Booking Tool)
  - Air and Rail Ticketing
  - Lodging Reservations
  - Ground Transportation
  - Travel Profile Management (Traveler info)
- Specialty Travel Services
  - Conference and Meeting Planning
  - Charters
  - Athletics
  - Group Travel (Domestic and International)
  - Student Org/Club Sport Travel

Bowling Green State University

Current State-BGSU

- BGSU does not mandate the use of its travel partner currently

- BGSU does not have a dedicated travel manager

- BGSU utilizes Chrome River for expense reimbursement

- Became involved with the IUC process to :
    - Replace existing provider and contract
    - Seek opportunities for Athletics' charter services
    - Improve travel management services at the University
    - Learn more about how other universities manage travel procedures

Bowling Green State University

Christopherson Roll-Out Strategy at BGSU

- " Quiet" or "Soft" launch on April 15th

- Focused on:
  - Updated website with new information
  - General communication about change
  - Basic traveler process stayed the same
  - Improved car rental (Enterprise) billing
    - Direct billing and/or P-card

Bowling Green State University

FY 2020 objectives and beyond

- Develop a category management process for travel within Purchasing
  - Consider new P-card options and or other "improvements" to the travel process
  - Work on building out the **program** from start to finish (how-to guide) with **benefits** for travelers
  - Define the cost of non-compliance
- Consider mandate and launch with new program details/benefits

Ohio University
Travel Services – Case for Change

- Current Travel Management Company (TMC) was not meeting needs (pricing, service, etc.)

- Outdated policies that didn't align with practices

- Better compliance with federal mandates for travel (e.g. Fly America)

- [Governor's Affordability & Efficiency Mandate: Travel](#)

  - University traveler must book through TMC using Concur or Agent

Ohio University - Campus Feedback and Involvement

- February '18: Key pain-points identified in campus survey
  - More expensive than online (Fees and options)
  - Lack of confidence/trust due to negative experience with current TMC
  - Online tools are easier and more convenient
  - Not aware online booking tool existed
- October '18: Introduced new TMC to campus
- December '18: Faculty & Researcher Focus Groups
  - Coordinated and communicated through Faculty Senate
- December '18 – '19: Staff Feedback
  - One-on-one meetings with frequent travel bookers & staff travelers
  - Identified by CFAOs
- December 2018– January 2019: Group Feedback
  - Large group & specialty travel
  - Advancement, OGAIS, Athletics, Student Affairs

Ohio University – Project Scope

Travel Services Project Deliverables

- Updated Travel Policy & Procedures
- Updated Purchasing Card (P-card) Policy & Procedures
- Travel Management Company (TMC) Implementation & Reconfigured Online Booking Tool (OBT)

- Individual and Group Travel Services
- Concur Expense User Interface Upgrade
- *Student Travel Services*
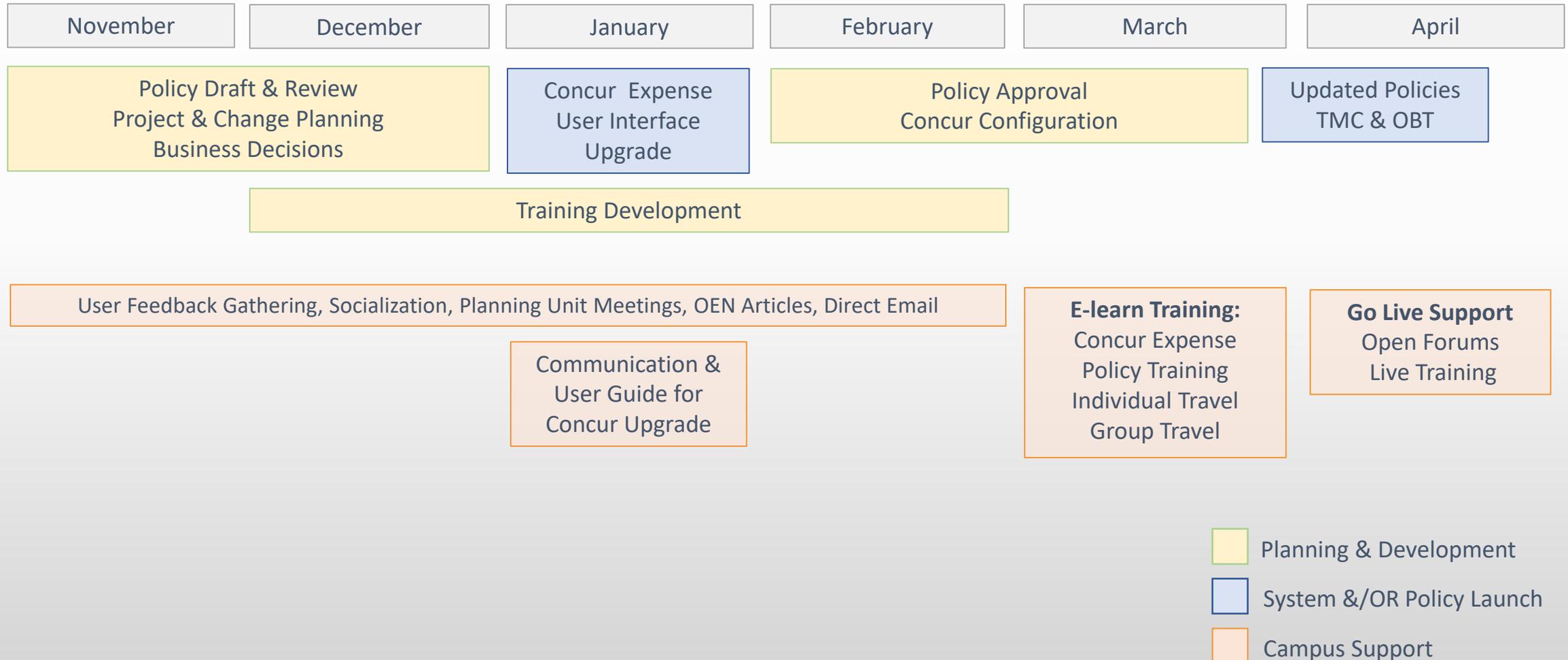- *Pre-approval in Concur*
- Training

Separate Implementation Track

- *Duty of Care*

Ohio University – Tentative Rollout Schedule

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★ 4/1 Go-Live

November	December	January	February	March	April

Policy Draft & Review / Project & Change Planning / Business Decisions

Concur Expense User Interface Upgrade

Policy Approval / Concur Configuration

Updated Policies TMC & OBT

Training Development

User Feedback Gathering, Socialization, Planning Unit Meetings, OEN Articles, Direct Email

E-learn Training: Concur Expense / Policy Training / Individual Travel / Group Travel

Go Live Support Open Forums / Live Training

Communication & User Guide for Concur Upgrade

Planning & Development

System &/OR Policy Launch

Campus Support

Ohio University – Change Management

- Open Forums, One on One meetings, Group meetings
  - Report summarizing issues/concerns and responses

- January 2019: Travel Webpage (ohio.edu/travel)
  - Communication links
  - FAQ's
  - Quick Reference Guides/Job Aids

- Regular communication to campus – about every 2 weeks

- E-training program (individual and group travel)

- Consistent Messages

- Post Go live Support – Info sessions and open labs

Ohio University

Changes.. Can be hard

- Mandated use of TMC
- Getting past the previous TMC experience
- Booking through Concur
- Economy fares and prepaid hotel rates
- Conference hotels (paying for it)
- Elimination of purchasing cards
- Per diem reimbursement (after the fact)
- Alternative payment methods (new way of doing business)
- Mixing business & personal travel
- Travel booked prior to transition
- Duty of Care

Ohio University

- ## Dedicated Travel Manager
  - On Site – Athens Campus
  - Christopherson Business Travel (CBT) Employee
  - Recruited through CBT
  - Many years of travel experience
  - Liaison between campus and CBT

  - CBT curtailed resources to project, because they relied heavily on our travel manager's experience

Ohio University

- ## What Went Right
  - Senior management support has been unwavering
  - Phased approach to the mandate compliance
  - Making Concur results match internet searches
  - Travel manager

- ## Lessons Learned
  - Access to Concur travel – late in the process
  - CBT overextended in some cases, get a project manager right away
  - Defining roles and responsibilities of project team
  - Inconsistent or wrong messages due to project discovery
  - Even though we have communicated, some are still surprised

Thank You!!

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