

Defining Your Role as Government Travel Manager- Best Practices

National Travel Forum

June 5, 2008



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Welcome

Today's Presenters

- Corporate Perspective: Harriet Washburn, IBM
- Government Perspective: GSA Initiative: Karen VanBuskirk
- Government Travel Manager Perspective: Neville Withington



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Today's Agenda

- Learn guiding principles
- Understanding your Role as Travel Manager
- 5 key travel management strategies



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Best Practices in Corporate Travel Management

The Corporate/Private Sector
Perspective

Harriet Washburn

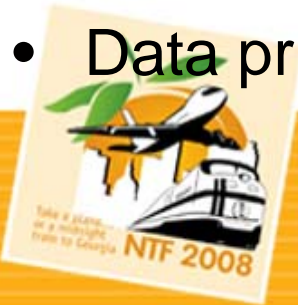
IBM



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Key Challenges

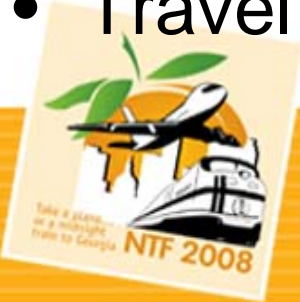
- “High Pressure Environment” due to the economy; travel managers need to demonstrate quantifiable value and ROI every day
- Achieving appropriate balance between cost savings/cost cutting and customer satisfaction
- Focus on “strategic sourcing”, increasingly outside of travel manager’s purview
- “Competition” from public internet sites
- Traveler safety and security
- Data privacy concerns



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Common Principles/ Key Tenets

- Travel policy
- Designated payment system
- Designated travel agency/online booking solution
- Preferred suppliers
- Management reporting/data collection and analysis
- Travel Manager/Travel Department



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Many corporate programs also have:

- Scorecards/dashboards/key performance measures
- Data warehouse or 3rd party data aggregator
- Traveler tracking methodology
- Communications and education strategies incl. portal, intranet site, newsletters etc.
- Online expense accounting and management systems
- End to end (booking through reimbursement) reconciliation, data integration and processing



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Diverse Configuration Options

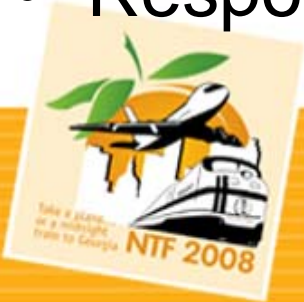
- Onsite
- Call center (dedicated or shared counselors)
- Linked call centers (dedicated or shared counselors)
- “Follow the sun” call centers (dedicated or shared counselors)
- CTD (Corporate Travel Department)



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Key Satisfiers for Travelers and Travel Arrangers

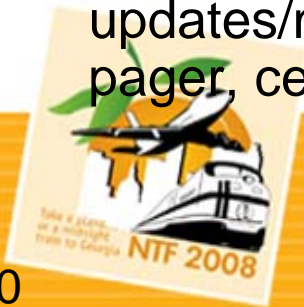
- Effective communication -easy access to information on policy, and whom and how to reach out with questions, complaints, issues.
- Efficient booking options
- Informed decision support –to facilitate the right buying decisions
- Effective and prompt issue resolution
- Responsiveness, assistance, and support 24/7



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Coming Attractions: What's on the Horizon

- “Wikipedia” – User Generated Content
- “Mashup” – Web application combining data from more than one source into a single integrated tool. (e.g. the use of cartographic data from [Google Maps](#) to add location information to real-estate data, creating a new and distinct web service not originally provided by either source)
- MetaSearch Engine – Searches multiple search engines and/or databases and aggregates the results into a single list or displays them according to their source
- Web/Travel 2.0 – Interactive, configurable, individually customizable sites
- Anticipatory Support – Predictive customizable updates/messages/information delivered to desktop, laptop, PDA, pager, cell phone.



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Government Framework for Travel Management: GSA Initiative

Karen VanBuskirk,
GSA Contractor Support



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“First Class Travel at your Expense”

Philadelphia Inquirer October 8, 2007

“Bureaucrats on the Beach: Federal Agencies and Conference Spending”

Subcommittee on Federal Financial Management...February 7, 2006

“Millions Wasted on Government Travel”

Associated Press October 2, 2007

“Senate Bill toughens travel card rules”

Federal Times March 12, 2007

“Unused seats cost Defense \$100-million”

St. Petersburg Times, June 9, 2004



GSA conducted analysis

- IBM Study of Leading Practices in Travel Management
- BPR Snapshot of Travel Management Practices at 4 government agencies
- Experience from ETS deployments
- Customer Interviews: Formal and Informal



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General findings: Current Situation

- Travel management has not always been given the significance it deserves
 - Government spent in excess of \$16B on travel in 2006
- Value of travel management is underappreciated
- Travel is becoming increasingly more complex function to manage
- Many agencies don't invest in travel manager or policy training



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General findings: Government on the right path

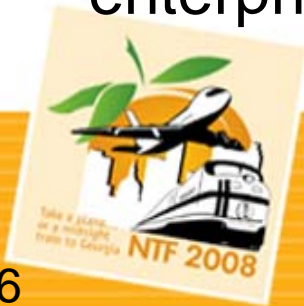
- Centralized government authority for travel policy
- End to end electronic travel solution creating the platform for unified application of travel policy and service delivery
- Leverage spend with CPP, Fed Rooms Lodging Program, TSS, SmartPay, Per Diems and Car Program
- Agencies interest in hearing and implementing structured travel program



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What's the Framework for Professional World Class Travel Management?

- Centralized Travel Management Office with top down senior management support
 - Designated Senior Travel Manager position with defined role and authority over travel management components
- Explicitly defined travel management program that has comprehensive authority over air/rail/lodging car, TMC and data. May include policy, meetings, CC, safety/security, per diem (if used)
- Travel policy, clearly understood and communicated consistently, and applied and updated throughout enterprise



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Framework..con't

- Consolidation of travel services
- Strategic sourcing function
- Travel technology deployed to streamline reservation, expense reporting and payment processes
- Robust performance management system to support:
 - vendor negotiations
 - monitor cost savings
 - policy compliance
 - measure performance
 - Customer satisfaction



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Federal model for world class travel management

- Designated Federal Travel management authority for all major travel management components
- Robust performance management system to monitor cost savings and policy compliance, measure performance and support government wide travel programs
- Travel Policy that addresses all key areas for travel management to support the agency mission

Travel Managers add value in controlling expenses and help reduce costs



Role of the Travel Manager

- Strategic in focus
 - Clear understanding of culture, goals, objectives to drive development of travel programs
 - Keen understanding of industry changes and impact on travel program
 - Develop strategies to generate overall savings
 - Increase use of technology to gain operational efficiencies
 - Change management issues related to new technology
 - Communicate up, down and all around the enterprise



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Managing Travel in a Changing Environment

Neville Withington, National
Science Foundation, Branch Chief



NATIONAL SCIENCE FOUNDATION

- Grants Management Agency
- \$5,000,000,000 annual appropriation
- BRM Agency
- 1200 people (approximately)
- 15,000 invitational travelers
- 8,000 staff travel events a year



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NSF TRAVELERS

- High volume of travel for an agency our size
- Many staff members NOT permanent Government employees
- We turn over 1/3 scientific staff every year
- We have to let 1000 flowers bloom



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Our Realization

Travel is far and away one of the most difficult services to manage. It is governed by a voluminous set of government travel and financial policies; it is at the mercy of the travel industry; and it is affected by such uncontrollable factors as the weather and the economy. It is, at the same time, a rigid and volatile collection of processes that has confounded even the best and brightest of NSF staff...



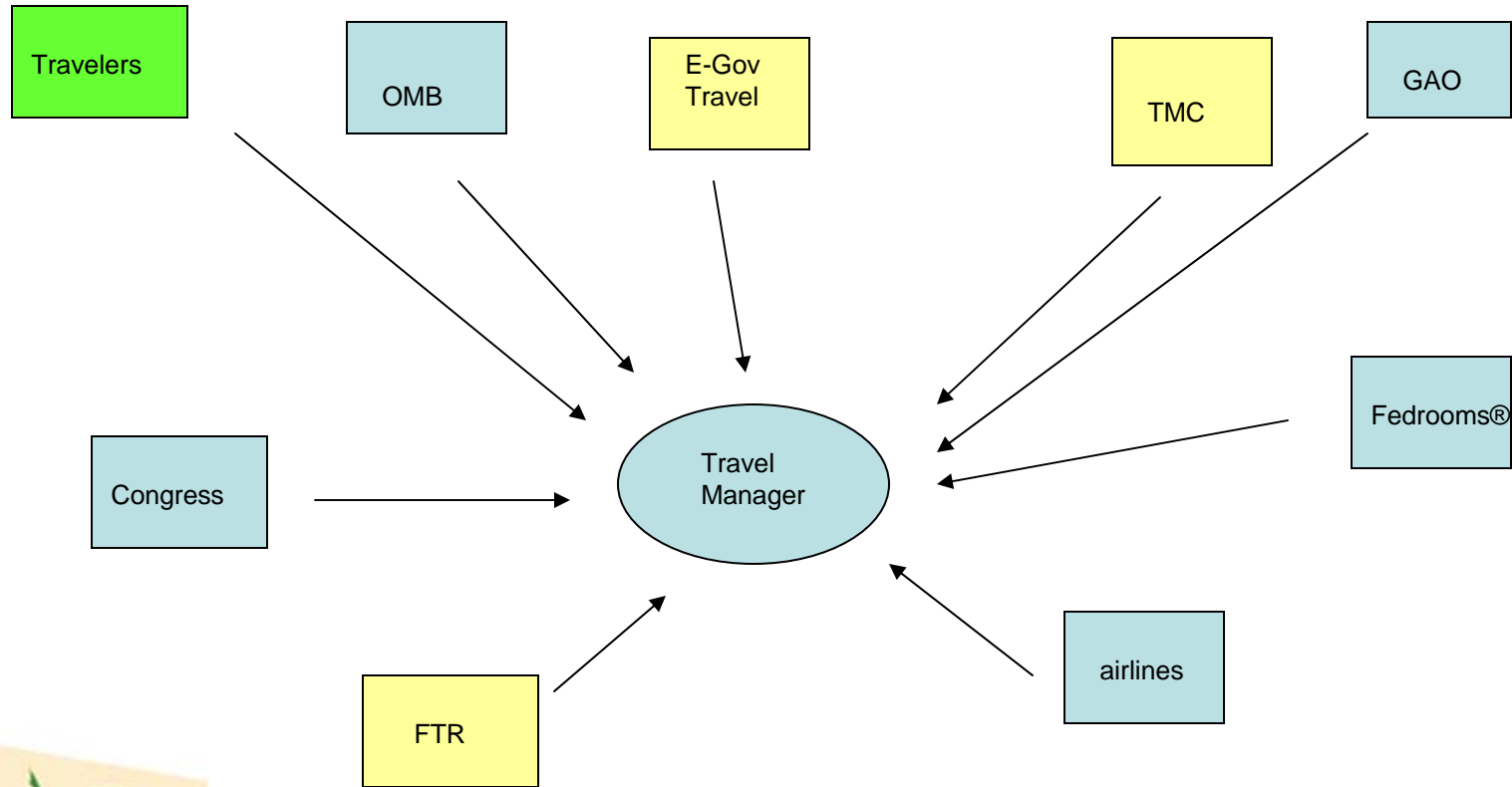
So how do we minimize the bureaucracy, keep everyone legal and keep our agency out of the Washington Post?

It isn't easy!



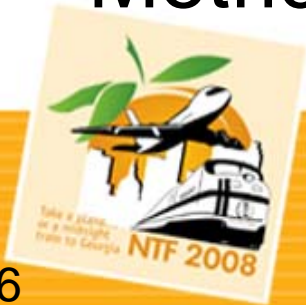
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Pressures on Travel Managers



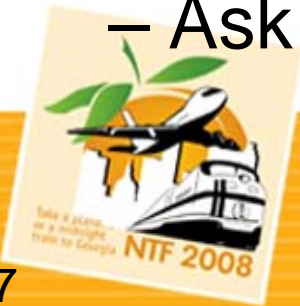
NSF “Tools” for Travel Management

- Communications
- Customer Service
- Policy Interpretation
- Knowledge and acceptance of agency culture
- Knowledge of travel industry
- Metrics



Communications Tools

- Training, Training, Training....
 - E-Gov Travel training
 - General Travel overviews for both staff and invitational travel
 - Passports
- Newsletters
 - Blue Skies
 - Ask Neville



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Communications Tools (continued)

- Comprehensive Web site
- Handouts
 - For new employees
 - For major changes in system or policy
- E-mail updates
- NSF Bulletins – for policy updates



Travel Order and Financial Obligation Policy

SUBJECT: UNAUTHORIZED TRAVEL
DATE: September 5, 2007

It is a Federal Government requirement for all Federal travelers to have funds obligated prior to departure on their trip and before incurring expenses on behalf of the Government. NSF employees (including rotators) who do not comply with this requirement will not be reimbursed for travel expenses.

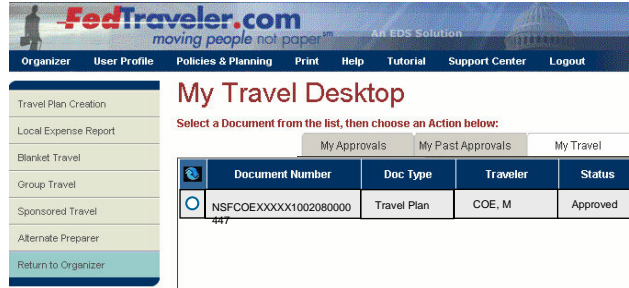
Unauthorized travel constitutes spending taxpayer funds without proper authorization and funds obligation. This creates two problems, one for the Foundation and one for the traveler. For NSF, it could create an Anti-Deficiency Act violation. For the traveler, it means travelers are not covered under the Government's travel official protections in the event of accident, injury or death.

In order to have funds obligated, all Federal travelers need approved travel orders. NSF guidance can be found at [/inside.nsf.gov/administrative/travel/travel_policies.cfm](http://inside.nsf.gov/administrative/travel/travel_policies.cfm) in the Administrative Policies and Procedures website and at [/inside.nsf.gov/travel/policies/](http://inside.nsf.gov/travel/policies/) in the NSF Travel website...

It is the responsibility of all NSF employees who are traveling to ensure that travel orders are approved prior to departure on a trip. Every employee should verify with his/her, administrative officer and in FedTraveler that travel orders have been approved prior to travel. If the employee does not ensure that an approved travel order is in place prior to travel, the employee will not be reimbursed for travel expenses.

*Anthony Arnolie
Director, Office of Information Management*

*Thomas N. Cooley
Director, BFA and Chief Financial Officer*



Document Number	Doc Type	Traveler	Status
NSFCOEXXXXX1002080000447	Travel Plan	COE, M	Approved

You will be notified via email when your Travel Plan has been approved and obligated. An authorized Travel Plan will also show a status of *Approved* on My Travel Desktop in the FedTraveler.com system.

REMINDER:

Verify your Travel Plan status at least 3 business days before you travel to make sure that your trip is authorized. See back panel for procedures.




Authorized travel will enable you to be reimbursed for all allowable travel expenses.




Unauthorized travel may mean that you are not reimbursed for your trip expenses or covered in case of accident.

Travel that is not approved and obligated in the integrated FedTraveler.com/FAS system prior to your trip is unauthorized travel.


The information below addresses some common misperceptions:

 Travel that has been approved orally by your supervisor is not authorized travel; your travel must also be approved and obligated in the travel system.



 Travel submitted for approval in the travel system is not authorized travel until the Travel Plan status changes from *Under Review* to *Approved*. The status will change when the Travel Plan has received final approval and funds have been obligated for the trip.

Document Number	Doc Type	Traveler	Status
NSFCOEXXXXX1002080000447	Travel Plan	COE, M	Under Review

 Travel that is entered in the system or approved after your trip start date is not authorized travel; you must have an approved and obligated Travel Plan before you go.



Trip Start Date



FedTraveler Approval Date

VERIFYING AUTHORIZATION

Enter the FedTraveler.com system. On the Organizer page, click on Go to My Travel Desktop.



The My Travel Desktop screen will appear with a list of your current travel documents.

My Travel Desktop

	My Approvals	My Past Approvals	My Travel
Document Number	Doc Type	Traveler	Status
NSFCOEXXXXX100208000447	Travel Plan	COE, M	Approved

An authorized Travel Plan will show a status of **Approved**.

If the status of your Travel Plan is **Under Review** and you are due to travel soon:

1. On the My Travel Desktop page, select the Travel document with a status of Under Review for which you need immediate authorization.
2. Click on the Document Control button.
3. On the Document Control page, view the Approval level and the name of the Approving Official who currently has your Travel document.
4. You can then contact the approving official to find out when the document will be approved.

	My Approvals	My Past Approvals	My Travel
Document Number	Doc Type	Traveler	Status
NSFCOEXXXXX100208000447	Travel Plan	COE, M	Under Review

Choose an Action:

Open Document	Amend Document	Duplicate Travel Plan
Create Associated Trip	Build Expense Report	Document Control Options

HELP IS JUST A PHONE CALL AWAY!

SYSTEM HELP

On-Site Assistance

There are several very knowledgeable people on-site who can help you with system problems, including: R.A. Villanueva (292-8992, rvillanu@nsf.gov) and Kim Bryant (292-7006, kbryant@nsf.gov).

FedTraveler Help Desk

Call 1-800-741-9943 and select the option for technical assistance, which includes help with passwords, profiles and system processes. These support options are available Monday through Friday, 8:00 am - 9:00 pm EST. You may also e-mail for help to: Callcenter@FedTravelersupport.com.

TRAVEL POLICIES AND PROCEDURES

NSF has several staff members available to answer any questions you have about travel policies and procedures, including passport and visa procedures. Please call Barbara Gulick (292-7936, bgulick@nsf.gov) or Julie Speers (292-7563, jspeers@nsf.gov) in DAS with your questions about travel procedures. Neville Withington (292-7573, fwithing@nsf.gov) or Julie Speers can help you with policy issues.

Questions about international country clearances should be directed to Tracy Zeigler (292-7217, tzeigler@nsf.gov) in OISE.

For non-Federally sponsored travel information, contact Robin Fritsch (292-8060, rfritsch@nsf.gov) in OGC.

FINANCIAL MATTERS

Contact Christine Bowles (292-4571, cbowles@nsf.gov) in DFM.

NSF TRAVEL WEB SITE
<http://www.inside.nsf.gov/travel/>

See the Travel Web site for travel information, official travel policies, news and updates



**Authorized &
Unauthorized
NSF Travel**



Customer Service Tools

- Answer all e-mail as soon as possible
- Return phone calls quickly
- Give the customer what they need, not just what they ask for
- Stay consistent in responses –have stock ones for frequently asked questions or services
- **KEEP SMILING!**



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Policy Interpretation

- Have to stay within the FTR
- Work with the traveler within that framework to get what they want
- Standardize policy “exceptions”
- Say no nicely with an explanation



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Agency Culture

- NSF thinks it is unique (and in some ways it is)
- Lots of highly educated people (but not all with common sense)
- Several non career employees
- Very autonomous organizations within the agency
- Small agency - informal often works



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Knowledge of the Travel Industry

- Monitor the news, read specialized publications, keep abreast of changes
 - In Industry (checked bag charges, folding airlines)
 - In Government (Fuel surcharges, Fly America Act)



Metrics

- Monitor travel for:
 - Costs
 - Trends
 - Use of GSA programs such as FedRooms® and city pair program
 - Monitor policy exceptions



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To paraphrase Wendell Philips:

"Eternal vigilance is the price of Travel."



"If travelers were angels, no government would be necessary....neither external nor internal controls on government would be necessary."

-James Madison (sort of)



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Thank you for attending!

