

Concur Service Advisory Board Meeting Minutes

May 5, 2021

Attending: Stacy Williams Wright, Brooke Millett Montgomery, Laurie Jacoby, Theresa Hoffer, Leeann Ford, Teri Rowe, Michael DeMartini, Brian Strait, Jim Klenke, Angie Peatow, Mark McCulloch, Adam Unger, Elizabeth Backus, Rebeca Silva, Jody Bleisch, Della Green and Sally Frisella

Travel Policy

Kelly Wolf has presented Travel Policy rewrites to the Policy Advisory Council (PAC) after a review by General Council. GC offered advice involving language recommendations regarding duty of care. The policy will then be presented for public comment in early May for one month, and then route to the President's Office for final approval. The new policy adopts:

- UO Lodge Card for business airfare.
- No reimbursement for personally purchased tickets without a compelling business purpose.
- Source of the per diem changes to GDS instead of IRS
- Defines business location for lodging per diem to site of business rather than address of lodging.

Group questions: Will there be exceptions for ignorance of the updated policy? Travel Office anticipates that there will be a onetime exception allowed for education and coaching.

How do we increase communication and spread the word about policy updates?

- Delegates, Concur Service Advisory Board – forward as appropriate.
- List Serves: BAO, Travelnews, Deans/Directors, Budget Mgrs., DGAs
- Around the O coupled with a story about refunds and credits on unused tickets and/or TMC service success story.
- Adam advised and committee members agreed that messaging should come from VP Level offices.
- Brian can leverage Concur report function to distribute communication to new/infrequent travelers.
- Messaging can be set to fire with future Concur Requests.
- Encourage departments to offer travel onboarding information for new employees
- Identify travel superusers in each area that new travelers can reach out to for travel assistance. (Departments need to identify Concur user groups assignments and delegates to travel office to configure user profiles.)

Current Travel Procedure Changes

TAG will be delegating the approval process down to department heads in mid-May. Department heads will provide approval, travel office will approve (bypass TAG). Request approval should be faster with one less step of approval. TAG will be called upon to approve complicated, lengthy, or Level 4 Risk and above destinations.

“Back to Travel” campus survey

Back to Travel survey was sent to Concur Advisory Board, Concur Processors and UO Budget Managers. Results:

- 68 responses
- 60% of responders anticipate an increase in travel when suspension is lifted.
- Majority of responders have not considered a reduction of travel budgets.

- Of those departments that are planning a reduction of their travel budget, they cite safety during the pandemic as the major reason for a reduction of travel.
- How will travel be approved?
 - More than half of responding departments are implementing a trip approval framework, while the remaining portion of departments are empowering travelers to decide.
- Of departments who plan to prioritize certain types of travel and restrict others
 - Conference and professional development travel will be limited.
 - Guest travel to campus will be restricted.
- Effectiveness of virtual meetings and conferences is the main factor departments are considering when making decisions about travel. This dovetails with conference and professional development travel being more limited.

NCAA has lifted its travel ban and Athletics recruiting travel begins on June 1. Committee members offered comments about having no travel budgets, departments will have less collaboration travel and that conferences may continue virtually. Seminar speakers will be fewer with many virtual offerings.

Some groups want live seminars for better experience but there is concern about cost. Admissions recruiters will visit schools but events might be smaller and potentially more of them.

There was a brief discussion about screening for personal travel added to business trips. Travel Office will take offline for discussion on current workflow and to better understand desired results.

Travel Office notes that the return to travel may be painful as delegates and travelers have not touched Concur or travel policy for 15+ months. We will be depending on delegates and processors to help support travelers, remind that:

1. Concur pre-travel approval in Request is required,
2. The booking tool is used to book after the travel is approved in Request.
3. Expense reports should be filed within 30 days of travel.
4. Travelers should know how to self-serve and that Concur Resources button offers Step-by-Step instructions with screenshots for all Concur process.

We are developing a video library as quickly as we can. Reminders to travelers to start planning a trip early in the week for approvals and booking and not wait until Friday afternoons or try to obtain approvals over the weekend.

Travel Industry Trends

New Airlines coming to Eugene:

- Southwest, serving Oakland and Las Vegas. Free bags – great savings for UO Athletics traveling with gear.
- AVELO – serving Burbank

Tips and Trends:

- Airlines have reduced schedules up to 90%. Eugene and Portland will have fewer offerings. Schedules may include smaller aircraft, additional changes of plane or longer connections.
- Best pricing will be closer to travel dates as airlines will offer distressed pricing to fill seats.
- City center hotels will continue to struggle as travelers are going to smaller population centers for safety. Hotels are facing staffing shortages and increased costs for cleaning protocols and moving to touchless services.
- Rental car companies will be challenged this summer due to semi-conductor shortage and aging fleets. Companies reduced fleets due to travel restrictions at beginning of COVID crisis.
- It will be necessary for travelers to become informed and educated to travel restrictions, vaccination, testing, quarantine, entrance, and exit requirements and necessary documentation.

- Fully vaccinated travelers will not be required to test. Many destinations like the EU will require travelers to prove vaccinations for non-essential travel.
- Varying and fluid state and municipal guidelines continue pertaining to traveler health requirements (testing requirements, quarantine rules, vaccination requirements, and availability of services in certain locations)
- Health passport products are numerous, but it is believed they will be condensed to only a few options to facilitate TSA and Airline consistency of use.

Duty of Care - Concur Locate replacement

Brian reported that additional negotiations with Concur have failed to result in a reduction of the cost of our service. To their defense they offered substantial reductions for Q2-4 in 2020. We are looking to maximize other Concur features, products and expertise to justify our cost since we are not anywhere close to processing the number of travel reports we were prior to the suspension.

Concur will no longer support the Locate platform after Sept. 1. We have an RFP in place to obtain Like-for-Like services from another provider. RFP closes in early May.

Our Risk representative for Concur, Flo Hoskinson left the UO but Deb Donning has returned to UO in this role.

Airline Contracts:

American and Alaska Airlines have entered into a partnership agreement and have extended an updated contract to the UO with traveler benefits including: mileage reciprocity, priority seating, priority boarding, lounge membership sharing. We believe the partnership allows them to be competitive with United and Delta to provide increased flight coverage.

Southwest Air is interested in a partnership with University of Oregon. They are gathering data on our airline sales and city pairs and will bring an offer in early summer.

Hotels:

Partnership Program

Travel Office is working to revamp our current program and is exploring an RFP dynamic and state government pricing and to concentrate our partnership efforts with a smaller core hotel offering. We will work to obtain additional benefits like flexible cancel rules, availability through the Concur Booking Tool, free parking, free shuttle, free breakfast. Will start with Eugene market and then branch out to Portland and to one or two hotel chains. Focusing on Booking tool will increase efficiencies for departments, enhance travel information for Duty of Care and increased use of One Card for greater card program rebates used to pay for Concur system.

CAS service center model is in the exploration phase with the Dean's office calling for nominations to the steering committee, and sub-groups looking at specific business practices. Timeline is to have a model in place by Spring/Summer 2023. The idea is that subject experts would help larger groups of people.

Hotel Tax Exempt program

Because of UO's tax exempt status we have an opportunity to save money on travel in the form of lodging tax exemptions. Travel office is exploring a Notre Dame and University of Tulsa model in which they have filed forms per state to obtain tax exemption. Travelers carry a certificate, pay with their UO One Card, and are not charged the lodging taxes. We are studying report to determine most traveled states. We believe there is a potential for 30K annual savings.

University wide business hub initiative being led by Jamie Moffit and John Marchetta

Budget savings, accuracy and efficiency are goals of the initiative. Benefits would be to create more expertise on campus with less training and turn over. The pendulum is swinging to create something between centralization and decentralization.

New Direct Bill Enterprise Rental Car

BAO Travel Office is soft launching a Direct Bill account to be used by smaller departments who do not have enough rental car activity to maintain their own account and who would benefit to have someone reconcile and pay a direct bill program for their unit. The process utilizes Concur Request for approval, booking tool to capture contract discounts and US Bank card program to increase card rebate to pay for Concur. Direct Bill number along with Emerald Aisle frequent renter program is entered into Concur to automatically attach to the booking tool reservation.

Fiscal year end process

Reminder that BAO accounting processes department accruals. All travel reports should be entered by mid-June for approval in FY21. Clean up reminders will go out mid-May and every two weeks through June.