Request Submission Sub-Committee

Date: February 14, 2019

Attendees: Laurie Jacoby, Naomi Crowe, Della Green, Stacy Williams-Wright, and Brooke Millett-Montgomery.

Absent: Kayleen Cautrell, Katy Molloy-Brady

Brief on minutes from previous meeting:

Clarification on minutes-regarding traveler review and approval of purchased airfare ticket: It is not desired that this be an additional step. This was meant merely as a comment that review of the purchased ticket seems more critical than the review and submission of the Request.

In general departments want to streamline processes rather than add steps.

Proposed submit process for research/grant areas:

- Verbal or email notification to coordinator to travel regarding dates and times
- Delegate will create and submit the request.
- Once ticketed, the delegate will be send an email to the traveler with their confirmed ticket via email with comment, something like:
  - Here is your booked itinerary, if there are any changes necessary, please let me know as soon as possible to avoid airline penalty fees.
  - If a change is needed later and there is no business purpose, options:
    - Traveler is offered a one-off exception and the amount is paid via the foundation OR
    - Traveler pay for the change.

Facts to support this proposal:

Grants are carefully budgeted and the business activities for given travel have already been approved within the budget and scope of the grant.

Some airlines are instant purchase which does not provide an opportunity to make a change.

Knight Campus has approximately 25 travelers and one delegate at this time. There are two back up delegates. An additional primary delegate position may be added to the staff in the next six months to support the process between the traveler and the delegate. Delegates are very hands on and work very closely with their travelers.

Next steps and considerations:

Propose the option of Request submission via delegate to Concur Advisory Board committee

- What would the rest of the committee need to know in order to make a recommendation?
- What is the contingency plan if a delegate leaves a position, how will the travelers be supported?
- If PI is the approver for the grant, who approves travel for the PI?
Laurie to reach out to Internal Audit to make sure the streamlined request process will withstand audit. Are necessary checkpoints being fulfilled? (IAD has been invited to next subcommittee group)

Centers and Institutes need to make decisions about how they will use Concur Groups. Travelers may have a home department group and they may be assigned to that group and those approvers. But they may primarily travel for the C&I with different approvers. How can workflow be set up for this crossover? Faculty travel versus GE travel, etc...

**Other discussion:**

Centers and Institutes fall into tiers of travel activity, high, medium and low.

There are 15 centers, four of them are high output, heavy travel.

There is no shared service team for all centers and institutes, but there may be some centers that don’t have budget for administrative staff and so they may share a service team for their travel needs.

Would a skip step for approval, or an auto approve and notify to Val Whelan for example, (tracking for budget purposes, not necessarily for approval) be worthy of consideration?

Vision/Goal: Choice of Workflows. The models would prescribe a submission and approval workflow based on the needs of the travelers, the department resources, and funds types. Each model would come with a set of prescribed best business practice/controls. Department could implement the model that best meets their needs.

If campus departments choose the model that best fits, a Concur Group can be created for departments (example: Mathematics) to allow for assignment of workflow and approvers. This may then lend itself to the cost object approval project.