

**Date:** February 28, 2020

**To:** Dan White, Chancellor

**From:** Amanda Wall, Interim Associate Vice Chancellor for Financial Services 

**cc:** Julie Queen, Vice Chancellor for Administrative Services

**RE:** Central Travel Office (CTO)

It is apparent there is a need for increased efficiency and improved customer service in our travel process. In the current climate, this must be done with a focus on sustainability and financial savings. As the existing Shared Travel Services (STS) office is in transition and improved structure has been requested it is the optimal time to realize the potential for improvement while addressing these key areas.

The proposed UAF Central Travel Office (CTO) is a customer-centric business model. Organizing in this manner would require the office to absorb all travel functions for the University of Alaska Fairbanks, thereby creating the ability to support units with a holistic approach, in addition to providing backup support and cross-training for travel. The office will provide a comprehensive, full-service travel experience across UAF, including travel planning, booking, arrangement, coordination, reimbursement and auditing with best practices, efficiency, and innovation. This will allow UAF to adjust to organizational and personnel changes while maintaining industry standards.

This is achieved through a business structure focused on continuous process improvement. Objectives include: standardized business processes, decreased transaction cycle-times, and dedicated expert-level support. This progressive approach will consolidate unit staffing but will allow us to cultivate industry and institutional experts providing a full-service travel center in a reduced budget environment.

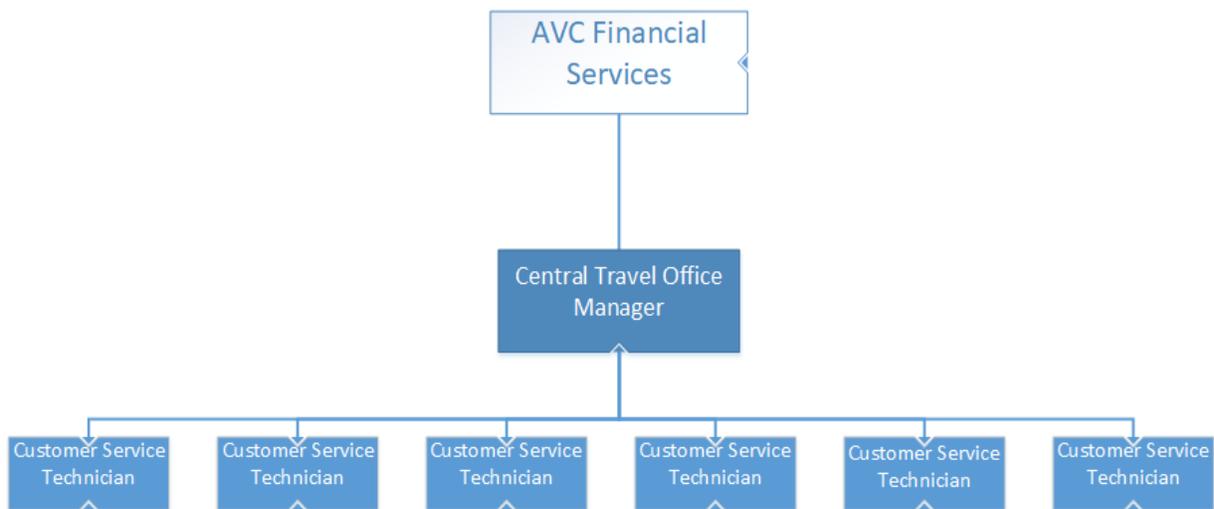
### **Accountability Structure**

The CTO will report to the Associate Vice Chancellor for Financial Services and be a department within Administrative Services. The financial services advisory group (representing all UAF units) will serve as a consultative group to define expectations from the unit and central perspectives, align philosophies and ensure that services are responsive to customer needs.

**Structure & Funding**

A single office for all travel transactions will provide consistent, accurate, and exemplary customer service. A CTO would require 6-7 full-time employees (one manager and 5-6 customer service technicians/trainers) to service the entire campus.

Below is a suggested organizational chart for the proposed office.



**Change Incentives & Support**

Utilizing the CTO model will enable each unit and department to focus its resources on achieving its unique goals by consolidating travel operations across multiple parts of the UAF campus. Staff members within departments are increasingly required to be experts in a wide range of systems and duties. This change will provide expert level travel service that does not need to be accounted for in departmental budgets, allowing these departments to reallocate their resources to other high priority needs. A dedicated travel office will increase the quality and speed of service delivery, and increase customer satisfaction while decreasing the overall cost. Cost savings will also be achieved through the ability to leverage the skills and knowledge of dedicated travel professionals.

This model concept was shared with Deans’ Council this week and was received favorably by nearly all members present.

*Note: The State of Alaska, which also uses (Corporate Travel Management) CTM, recently moved to a shared service model under the Department of Administration. Users in Fairbanks*

*admit to resisting the change but now report that the transition was very smooth and has reduced significant work at the department level.*

### **Benefits of Restructuring**

- A full-service travel office consisting of multiple travel experts will increase quality and the speed of service, thereby increasing customer satisfaction and decreasing overall cost.
- Exceptional customer service
- High level of standardization
- Efficiency gains with scale
- Benefits from coordination across units outweigh unit-specific expertise
- Cost-savings to units
- Primary staff can become experts
- Balanced workloads
- Increased ability to cross-train
- Increased ability to provide backup, avoiding delays due to absences
- Will provide greater/more evident FTE savings
- Recognizes similarities in core skills needed for transaction processing and reduces silos
- Best practices and exposure to tools to handle volume processing

### **Transition**

Although restructuring may be difficult at first, a structured approach to integration will lend to a smooth transition. Financial Services fosters an inclusive environment where all viewpoints are met with attentiveness and respect. This aligns with the vision leadership has for organically growing the campus as the department transitions into a streamlined team, becoming more effective at serving our students, staff, and faculty.

**Timeline**

Plan	Activities	Timeline
Phase 1: Plan	<ul style="list-style-type: none"> <li>● Approval for restructuring from Chancellor</li> <li>● Conduct project kick-off meeting, develop guiding principles/vision, and draft project charter</li> <li>● Develop a plan to meet with key unit/department stakeholders to create assessment and design plan</li> </ul>	April 1, 2020
Phase 2: Assess	<ul style="list-style-type: none"> <li>● Assess current business processes, systems, organization structure, and staffing, and identify key improvement opportunities</li> </ul>	April 2 – April 15, 2020
Phase 3: Design	<ul style="list-style-type: none"> <li>● Design new processes, including enabling technology, roles and responsibilities matrix, and process documentation</li> <li>● Identify facility and logistical requirements and develop a facilities and logistics plan</li> <li>● Complete deployment planning, prepare facilities and workspace and finalize transition steps and timing</li> </ul>	April 16 – May 1, 2020
Phase 4: Implement	<ul style="list-style-type: none"> <li>● Support execution of a transition plan to operationalize CTO</li> <li>● Facilitate change management and training</li> </ul>	May 1, 2020
Phase 5: Optimize	<ul style="list-style-type: none"> <li>● Monitor new processes, monitor progress and identify/resolve issues</li> <li>● Measure defined key performance indicators, implement continuous process improvement, and conduct customer and employee satisfaction assessments</li> </ul>	Onward