Can it be done better, differently, cheaper or more efficiently?

A panel of School/Center representatives who have adopted creative ways for booking travel
Today’s Panel

Presenter
Kimberly Lopez, 
Admissions Officer

S/C

Penn Admissions

Jessica Bickhart, 
Program Coordinator

PSOM: Dept. of Pharmacology and ITMAT

Eli J. Lesser, 
Senior Director

Penn Summer & Non-Degree Programs, SAS

Kimberley Norton, 
Program Manager

Lauder Institute

Moderator: Holly Perry, Senior Account Manager, World Travel Inc.
INCOMING TRAVEL
STUDENTS
Goal: Arrange air transportation for 150-200 high school seniors visiting Penn from across the country.

Issues:
• Affordable airfare (goal: average flight cost of $500)
• No more than one plane change
• Short program – red eye flights necessary from West Coast
• Time constraints - dependent on staffing and programming
• Students fly in and out of Philadelphia
• Penn Admissions funding flights
• Anything outside the norm required approval

Biggest Challenge:
Decision release and event invites go out just 10 days before event start.
In Prior Years

Penn Admissions collected flight request data and booked flights through Concur Guest booking feature.

- Required 10 staff members over 10 days
  - Quaker Days bring over 900 guests to campus – staff resource would normally be dedicated to this
- Limited staff on weekends to assist with booking
- Communication problems
  - Relied on students to fill out travel request form in timely fashion
  - Dependent on form accuracy

How can flights be booked more efficiently?
Create a Concur Event

Goal: have students book their own travel through the Concur website using criteria that was pre-set by the Penn Admissions office (pricing, travel times, layover details etc.).

*This is not the same as the Concur site Penn staff see when booking travel, but still includes Penn airlines discounts.

How does it work?

World Travel works with Penn Travel Services and the Penn department that needs the site. Criteria are defined, site is built, all parties test the site.
Once the site is set up:

- Travelers receive a unique login to access Concur Event site.
- Students log in and input travel info.
- Site will produce a list of flight options (looks and acts like Penn staff Concur).
- Student selects a flight.
  - If flights meets all Admissions criteria, site will allow student to continue.
  - If flight does not meet all criteria, site produces red exclamation point and explanation.
    - If flight meets most criteria, requires approval, but site will allow student to continue.
- Site will ask for their TSA information – name, birth date, gender.
- Student will continue to click through until the “Finished” page.
- If all criteria were met, itinerary is pre-approved and is ticketed immediately.
  - If approval is required, site will produce approval email, Admissions will evaluate and approve or suggest new flight option.
Result

• Students (or parents) can review flight options and choose one that best meets their needs.
• Requires less Penn Admissions staff; staff needed to approve flights or suggest alternative flights.
• World Travel reports available with participant flight information, itineraries, pricing, etc.
• If there are issues with flight delays and cancellations, World Travel is available 24/7 to assist the traveler.
• If Penn is paying, the University direct bill BTA can be used; costs are allocated to the account code assigned during the site build.
QUESTIONS?
INCOMING TRAVEL

CONFERENCE SPEAKERS FROM AROUND THE GLOBE
**Goal:** Arrange travel for speakers coming to Penn for the annual ITMAT Symposium

**Issues:**
- Travel is both domestic and international – from Asia, Europe and the U.S.
- Penn pays up to a certain amount per round trip ticket, and that amount is different depending on their departure location (continent or east coast/west coast U.S.).
- Any cost over that amount must be paid for by the traveler at time of booking.
- The proper budget number (international or domestic) must be attached to the flight record.
Process:

- Symposium coordinator contacts Hilary Easley from Penn Travel Services approximately 4 months prior to event to provide the following information:
  - Excel spreadsheet of all guest speaker names (30-35 people).
  - Limits for travel costs and additional information regarding restrictions (e.g. if speakers would like to travel business class and the amount is over the limit, we can charge the additional costs to their personal credit card).
  - Two budget codes - one to be used for domestic travelers and one for foreign travelers.

- Penn Travel Services works with World Travel to inform their agents of ITMAT travel.
  - Note: This information is also input into the screens seen by World Travels’ afterhours agents so that anyone calling to book travel, and identifying themselves as part of this group, can be properly assisted.
The symposium coordinator receives confirmation from Penn Travel Services and World Travel that their agents are aware of the ITMAT speakers and all Penn criteria for these flights.

The symposium coordinator contacts all speakers with the following information:

- Instructions on booking your airfare by calling World Travel Inc. at 888-641-9112.
- Reference ITMAT SYMPOSIUM OCTOBER when speaking with the travel agent.
- The limits for travel costs based on estimated flights and business administrator approval.
  - Business/First class tickets can be purchased by paying the difference on personal credit cards.
  - All economy fares will be billed directly to ITMAT.
- Contact information for Penn’s Travel Service and World Travel Inc., in case of questions or emergencies for people who are traveling inside and outside of the USA and opt to use this service.
End Result

Huge Benefit: Less post-event reimbursements!

• Others benefits:
  • Travelers have a go-to emergency phone number (World Travel, 24/7 availability) in case of flight cancellations and delays.
  • Copies of all itineraries can be sent to symposium coordinator if desired at time of ticketing.
  • A report of arrivals and departures can be provided by World Travel as helpful information for the ITMAT symposium coordinator.
QUESTIONS?
Wharton: Lauder Institute Culture Quest

**Goal:** Coordinate International hotels and transportation for student group

**Issues:**
- Culture Quest is a ten-day non-credit course where students travel to a different region each year
- In the chosen region, participants have a starting point and a final destination – we arrange accommodations and local travel as needed
- This mostly covers local transportation (bus, car hire) but can also include flights
Process:

• When destination is chosen:
  • Contact local alumni and see whether there are any Penn programs in the area (Global Activity Map)
  • Research flights, hotels and site to visits in the region
  • Travel to the region to visit hotels, museums, local businesses, and local transportation companies, determine the safest places to stay, and confirm site visits
  • Follow up with local contacts when back on Penn’s campus to finalize the trip

• Local relationships are especially helpful for exotic locales:
  • Guides are flexible and willing to work within time limits
    • Bhutan – Guide was able to arrange two arrival options (plane or bus) and allowed us to figure out feasibility of bus travel subject to a limited timeframe and government regulations
  • Contact Penn preferred vendor and ask for an introduction to the local hotel concierge or group travel representative, rather than cold-calling
    • Nairobi – Hilton Inn at Penn to Hilton Nairobi
• Use local contacts and ISOS for health and risk assessments:
  • Ensure that regional transportation and attractions are safe for students
    • Rwanda – Local guide offered advice on a diverse and interesting travel itinerary that was still very safe
  • In emergency situations, use the advice of knowledgeable locals to make modifications to travel plans
    • Bhutan – When an earthquake struck the region, local contact suggested safe route changes that allowed us to proceed with our trip
  • Account for road conditions, safe routes, weather, health risks
End Result

• Sense of control in unfamiliar environments

• When faced with unexpected changes, better ability to adjust schedule and avoid risk

• Builds a stronger network of resources, setting the foundation for repeat trips
QUESTIONS?
Penn Summer Abroad

Faculty Lead – Credit Based Programs

Undergraduate
  99% Penn Undergraduates

Program Length
  10 days - 6 weeks

The Alps       Havana, Cuba
Athens, Greece London, England
Berlin & Rotterdam Madrid, Spain
Buenos Aires, Argentina Tours, France
Cannes, France Venice, Italy
Faculty & Program Director Travel

Program Travel Stipends
  24 instructors/program directors
  Housing, Flights, Personal Expenses
  Booked using Concur, but not exclusively
  Flexibility – Instructor preference

Academic Expenses
  Connected directly to teaching
  Provided in a budget approved annually

Costs absorbed by tuition (1 or 2 CU programs)
Student Travel

Summer 2016
196 students travelling

Students book their own flights
Summer flexibility

Program includes housing and activities

Costs absorbed by Program Fee charged in addition to Tuition
Summer Abroad

Goal: Support faculty and students enrolled in one of ten credit based programs taught in locations around the world during the summer

Issues:
- 24 different instructors
- 10 different locations
- Programs are all unique
- Budgets built on a combination of tuition and program fee
Process

Instructors

Travel Stipends - provided in lump sum
- Housing, Flights, Personal Expenses
- Calculated based on avg. flight costs, published per diem, & survey of local area + total days in country
- Booked using Concur, but not exclusively
- Flexibility – Instructor preference on the use of funds

Academic Expenses
- Connected directly to teaching and student experience
- Provided an annual budget – line itemed
- Receipts processed through Concur
- Travel Cards + Cash Advance

Students

Summer 2016: 196 student travelers
Booked and paid travel themselves (flexibility)
Housing & Activities covered in Program Fee in addition to Tuition
End Result

- Support the needs of instructors and students
- Templates are developed and adaptable to new programs
- Track expenses on a per program basis
- Provide the flexibility you need in summer
QUESTIONS?
Can it be done better, differently, cheaper or more efficiently? ***YES!***