

From: Mc Cullough, Faye
Sent: Thursday, February 04, 2010 9:55 AM
To: Generales, Marianne
Cc: Larson, Donald; Brainerd, Sally
Subject: Follow-up - Proposed Travel Policy Revisions (G-28)

Hi Marianne,

Don forwarded the comments that you collected on the proposed revisions to G-28 from UCOP. As several of the comments were in the context of UCSD travel policy and procedure, information and detail is being provided (below).

The Connexus mandate is of major interest to all of us. The UC-wide mandate is required as the program will generate maximum benefit and value over time for the majority of UC's travel dollars. Consistent use of Connexus will predictably provide greater opportunity for savings and will support present and promote future supplier relationships and discounts. Locally, while we will need to implement a strategy to manage and address non-compliance including consequences, consideration will be given to authenticated distinctive travel requirements.

I will ensure that the comments and observations that pertain to UC issues are submitted to UCOP as well as the UC Travel Management Office as they are welcomed constructive feedback.

Please share the below responses with others as you deem appropriate.

Would it be helpful to have the UCSD Travel team provide an in-person session on Connexus and also respond to further questions in general on travel matters to the MSOs? If so, please let me know so this can be arranged.

Thank you for your time and for the comments (a special thank you to Helen). While these policies create challenges for Travel, too, having candid feedback is invaluable and guides us to the extent possible to take into account the uniqueness and variables that UCSD's business units must deal with in the development and implementation of local policy.

IGCC Comments

COMMENT *This has the potential to be a nightmare, depending on how the campuses implement the mandate. What exceptions will be allowed, and what justifications or approvals will be required? What about a traveler who has to change their return trip time/date while they are in another city? Will outside auditors accept the argument above (III.C.) that we should use Connexus even when we can get less-expensive tickets elsewhere?*

RESPONSE Agree that carrying out the mandate of Connexus at UCSD will be complex. UCSD Travel will provide detailed guidelines for exceptions and how to handle infrequent situations. Departments will also need to support the mandate – which might be problematic in some cases but will generate savings so there will be some trade-off. The consensus of UC is that Connexus will result in an across the board savings for UC in the millions. The first years (non-mandated) of the program have already generated documented savings well into the two digit million dollar figures – so the expectation is that outside agencies (much like the Federal government that has a mandated travel program for the most part) will be accepted and welcomed.

COMMENT *The Connexus mandate doesn't apply to speakers/participants who book their own travel to our events, but what about non-UCSD speakers/participants for whom we prepay the travel? They sometimes don't want to pay out of pocket, but may prefer to deal with a particular agent with whom they have a good relationship. And can we continue to use in-region agencies to book the travel for Mil-Mil participants? Another Mil-Mil issue is our use of Universal Travel to fulfill the Minority/Woman-owned business requirement in our DOD ME contract. Universal isn't on Connexus.*

RESPONSE The mandate is all-inclusive of travel booked by UC that can be acquired through Connexus. In respect to the Universal and other agencies that fall into the small business categories and/or other categories, this is being addressed by the Connexus program. Example is the present [RFI & Q \(http://www.ucop.edu/purchserv/rfp/ticket/rfq.doc\)](http://www.ucop.edu/purchserv/rfp/ticket/rfq.doc) that has been posted to encourage qualified small business designated agencies to participate. However, if the Connexus program does not provide an agency that fulfills a special requirement, UCSD Travel will collaborate with the department/customers to attain the necessary goals. What makes this a little difficult for all of us is the need to build new associations with the authorized Connexus providers and this in itself presents some challenges.

COMMENT *When we plan for foreign conferences, this restriction will impede us from using foreign agencies who may not have direct billing arrangement with the university. Clarification is needed for foreign agencies who will help us with foreign venues. Otherwise, this will not work for us.*

RESPONSE This is an important point and I will ask Dawn to contact IGCC to address this issue. Current providers have international travel experts – but I expect that this reference is to agencies located outside the US.

COMMENT *We need to be aware of the change and to make sure that any IGCC personnel who travel are aware that coverage isn't automatic if they make their own travel arrangements and don't go through Connexus to do it.*

RESPONSE Agree.

COMMENT *This is just an update to reflect a Jan 2009 amendment to the Fed Travel Regs. The link is bad, however, and the paragraph on the Open Skies exception fails to note an important exception to that exception (the City-Pair contract fares). As a practical matter, we can usually ignore the Open Skies Agreements and stick to US-branded bookings, because the City-Pair exception will rule out non-US carriers for pretty much all of our international travel. Here's a working link to the Open Skies topic:*
http://www.gsa.gov/Portal/gsa/ep/contentView.do?contentType=GSA_BASIC&contentId=24833

RESPONSE Agree. I have already reported the 'bad' link to UCOP and made some recommendations on other links to be included in G-28.

COMMENT *What to do when our travelers are in a foreign country? This reminds me of when the cell phones were first introduced and the policy came out against allowing for reimbursement for such costs, especially on contracts/grants. GPS is a fantastic technology and travelers should be able to use them if it's truly needed AND should be able to get reimbursed.*

RESPONSE Typically foreign travel warrants a higher percentage of exceptions. Each campus will need to provide published exceptions as to when a GPS might be allowed once we have the definitive policy.

COMMENT *This is a big (and welcome) change from the previous 55% limit, and will be most relevant to travelers doing field research.*

RESPONSE Agree, however, it too, is controversial for some departments when cost is a major concern. But as with policy in general, campuses can be more restrictive, so based on departmental requirements, the policy can be implemented accordingly.

General Comments - ORU MSOs

COMMENT *In a recent experience I was denied reimbursement for the Orbitz fee and had to pay it myself.*

RESPONSE Please provide the Event number so that we can research. Service and transaction fees as they pertain to official business travel are reimbursable.

COMMENT *Using Connexus will require a trip number be set up in advance which means that academic travelers cannot decide to book their flights at midnight when they have a spare moment; unless we have an admin 24/7 ready to set up a trip #.*

This change would go in the opposite direction of making academics more independent of administrative support.

RESPONSE As all UCSD business travel requires preauthorization (not just Connexus); this technically there is no change. If academics plan a trip, an Event number can be obtained at their convenience in advance. This will also allow the traveler to complete an on-line MyTravel to ease the expense reporting process and expedite reimbursement.

COMMENT *After reading this document, my only concern is “requiring the traveler to use Connexus”. What happens if the traveler doesn’t use this system? CER has several postdocs and grad students travelling to LLNL to conduct high energy research experiments. They handle all their own travel arrangements. Frequently they use Orbitz or similar services to book their airfare, hotel and rental car. I am not certain whether they will follow policy and only use Connexus.*

COMMENT *We have the same concern...our researchers handle their own travel arrangement. It is easier (most of the times cheaper) for them to use the discounted travel web sites than Connexus....*

RESPONSE As noted in the first response to IGCC, agree that implementation of the mandate of Connexus at UCSD will be complex. UCSD Travel will provide detailed guidelines for exceptions and how to handle unique situations. While indisputable non-compliance based on preferences (for example) will not be allowed, thoughtful attention will be given to bona fide business needs.

COMMENT *I looked at the proposed changes. I do not understand the logic behind the proposed changes under (4) and (5) below. My feeling is that GPS devices can be very useful to travelers and can save time and gas when in an unknown location, so I am not sure why they*

would disallow their reimbursement. Also, I am not sure why they would eliminate the limit to 55% of the per diem for long term travel (over 30 days). It means that travelers have no incentive to seek alternative cheaper accommodation when on a trip for more than one month, if they are going to be reimbursed at a hotel rate.

RESPONSE GPS – in UCSD's response to UCOP, the recommendation was made to allow for the GPS devices if required under the travel conditions/circumstances. But we will need to see what the final policy is to know for certain.

The change in the 55% 'rule' was to bring UC in line with government agencies. As individual campuses can be more restrictive, UCSD Travel will collaborate as necessary with departments to achieve a balance of economy and reasonableness.