



Project Title: Travel

Project Sponsor: Heidi Sann

Project Owner: Kelly Kozisek

Recommended Stakeholder Groups to Engage: Administrative units, academic units, policy teams, IT/IS, Audit Risk and Compliance, Beaver Works Core Group, subject matter experts processing reimbursements (travel and non-travel related), hands-on personnel developing and using forms, end users, and unit/department coordinators for reimbursements (travel and non-travel related), policy makers and authority for reimbursement related activities and tools (travel and non-travel related)

Introduction/Background:

The Beaver Works Core Project Team collected feedback from focus groups that targeted the travel process. Members of focus groups included representatives from both service provider and service user groups who actively participate in the reimbursement processes at OSU.

Problem Statement:

Lack of appropriate and/or complete documentation as well as inconsistencies in reimbursement processes between and across all units/departments adds confusion, frustration, and delays for parties impacted.

Standard Operational Excellence Team Expectations:

- Balance the business needs with security/compliance considerations (apply accepted risk tolerances)
- Identify and design consistent tasks, forms, processes, and systems
- Define ideal state roles and responsibilities and individualized training plans for those roles
- Identify and recommend an ongoing, structured, and consistent training plan that incorporates the full travel cycle
- Assess current policies against proposed processes and make policy recommendations for modified or new policies that are easily accessible
- Propose possible IT/IS solutions to Steering Team for improved system functionality and multi-system integration
 - Note: if an IT/IS solution is to be proposed, the team MUST still re-design processes, revise policies, and propose a plan to implement consistent processes before an IT solution is adopted.
- Develop training and communication plans for the implementation of the proposed solution(s)

Specific Operational Excellence Team Expectations:

- Determine where travel processes should reside and propose a set of roles and responsibilities (with potential organizational structures)
- Identify opportunities for consistency between and across departments/units for pre-approval, budget authority, payment, and application of policy/guidelines
- Seek innovative solutions to travel-related activities at OSU
- Improve transparency of process status through tracking mechanisms and/or improved communication
- Explore additional options for real-time payment versus reimbursement
- Strengthen travel partnerships to better meet university and traveler needs