

# Project Fast Lane

## Improving Travel and Expense



Project Kickoff  
December 2022



University of Massachusetts

Amherst • Boston • Dartmouth • Lowell • Medical School • UMassOnline

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# Topics

## ■ Project Background

- Travel & Expense – Important Functions that Need Improvement
- Travel & Expense by the Numbers
- Why Project Fast Lane?
- Expected Benefits

## ■ Technology Preview

## ■ Project Information

- Project Summary
- Project Team
- Timeline
- Campus Engagement & Communication

## ■ Questions/Staying Connected

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# Project Background

# Travel & Expense – Important Functions that Need Improvement

## System-wide Impact and Challenges

### Impact

- Thousands of employees conduct business travel and/or incur business and travel expenses

### Challenges

- Business & travel expense processes are clunky, manual, inefficient, & time-consuming
- Business & travel expense technology is antiquated and not integrated

## Addressing the Challenges - Progress to Date

### Updating Policies and Standards

- In July of 2022, UMass Board approved updated **Business & Travel Expense Policy & Standards**
- System-wide team is working on an updated **Travel Policy and Standards**

### Investing in New Technology

- Campuses worked together to select a new travel registry technology (HX Global)
- Campuses worked together to select a new business & travel expense technology (Concur)

## Next Step – Project Fast Lane

### Improve Business & Travel Expense

- Consolidate activities into one comprehensive project - “Project Fast Lane”
- Greatest potential level of improvement across policy, process, and technology

# Travel and Expense by the Numbers (CY 2022)



5,700 employees traveled



3,500 out of state trips



1,700 in-state trips



900 international trips



6,300 employees reimbursed



3,600 employees with bank card



37,000 total expense reports



\$45M total expense reports

*These numbers are approaching pre-covid volume*

# Project Fast Lane - The Tollbooth Analogy

MASSPIKE WELCOMES YOU

		DISTANCE (MILES)																
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15		
VEHICLE CLASS	ALPHA	0.90	0.90	0.90	0.90	0.90	0.90	0.90	0.90	1.10	1.30	1.60	1.70	2.10	2.25	2.40	2.70	3.00
	BETA	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.55	0.65	0.80	0.85	1.05	1.12	1.15	1.35	1.50
	C	1.35	4.95	5.65	5.15	5.55	6.90	7.90	9.70	11.10	11.50	11.95	12.20	13.00	14.25	15.10	16.10	18.00
	D	0.75	2.65	3.30	3.55	3.60	3.90	4.50	5.95	6.40	6.75	6.90	7.50	7.80	8.30	8.80	11.10	11.10
	E	1.05	3.70	4.20	4.50	4.85	5.10	5.65	7.15	8.20	8.50	8.80	9.75	10.10	10.60	11.20	11.60	11.60
U TURN PROHIBITED	1	1.10	4.00	5.20	5.65	5.10	5.40	7.30	8.20	11.20	12.10	12.90	13.20	13.90	14.90	15.90	16.90	17.90
	2	0.65	2.65	2.65	2.65	3.10	3.30	3.75	4.40	5.30	5.50	5.95	6.20	6.65	7.15	7.15	8.20	8.20
0	2.00	7.30	10.80	11.40	12.90	13.50	14.40	16.70	17.10	17.50	18.20	18.50	19.70	20.70	21.70	23.00	23.00	23.00

## The Old Way

- Waiting in long lines
- Taking a ticket from a tollbooth operator
- Trying to find change



- **Fast Lane**
- **EZ Pass**

## The Improved Way

- No tollbooth lines
- Transponder/plate image
- Direct connection to bank/credit card



# Project Fast Lane – Improving Travel & Expense



## The Current Way

- Complex processes
- Antiquated technology
- Time-consuming, slow

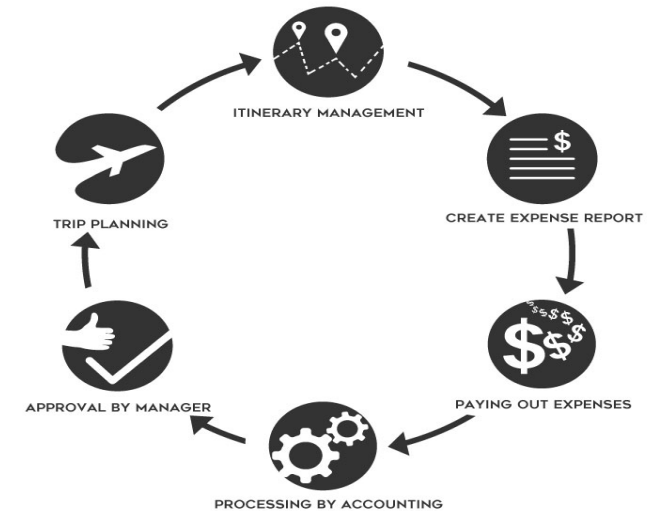


## Project Fast Lane



## The Improved Way

- Streamlined process
- Modern, integrated technology
- Efficient, “fast”



# Project Fast Lane - Expected Benefits



## Speed

**50% less time** to register and book a trip  
**40% less time** to complete an expense report  
**50% less time** to reimburse expenses



## Efficiency

**35% more efficient** expense handling  
**40% more efficient** auditing staff



## Accuracy

**40% reduction** in lost receipts  
**65% more compliant** expense reports



# Technology Preview

# Future Technology Overview

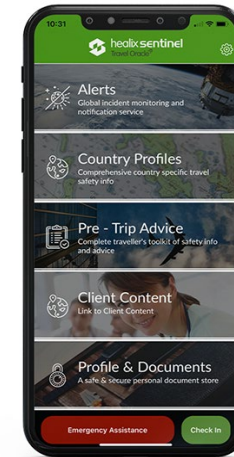
## SAP Concur - Travel & Expense

- Used by hundreds of universities
- Online travel booking
- Expense report creation and approval
- Will replace Peoplesoft Expense, Docusign exception/approval forms, Egencia\*, & Buyways bank card expense reports

\*Does not impact relationship with other Travel Management Companies

## HX Global – Travel Registry

- Global provider of travel risk management services
- Travel pre-approval and traveler notifications
- Will replace Terra Dotta



# Future Technology Features

## **Travel Registration, Travel Booking, Expense Reporting**

- Intuitive, modern look and feel
- Mobile app access
- Self-service travel booking with access to University rates/discounts
- Digital receipt capture
- Integrated travel registration/pre-approval/booking
- Integration with bank card for expense reporting
- Integrated UMass policy to prevent or highlight exceptions
- Direct cost allocation in expense report (reduce cost re-allocation)

## **Approval Process**

- Configurable workflow/flexible by campus, department
- Automated notifications, approvals, returns

## **Reporting, Audit, and Traveler Notification Capabilities**

- Advanced traveler notification capabilities
- Improved capabilities for audit and compliance

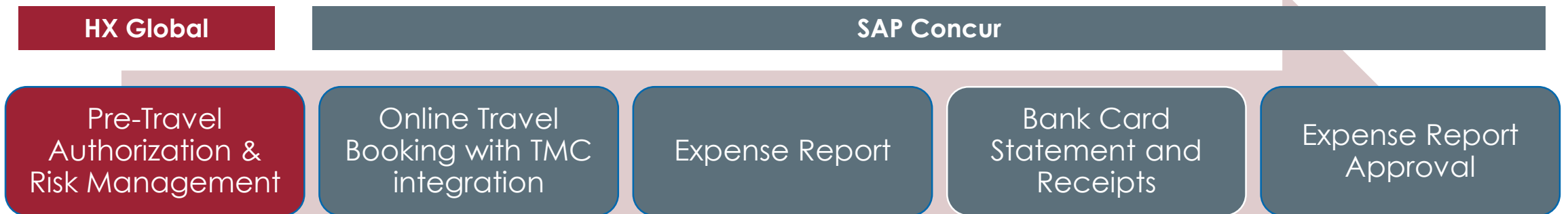
# Technology – Current to Future

## Current – 5 different systems with limited integration

*\*Peoplesoft used for UMPO and UMD*



## Future – 2 systems, well integrated



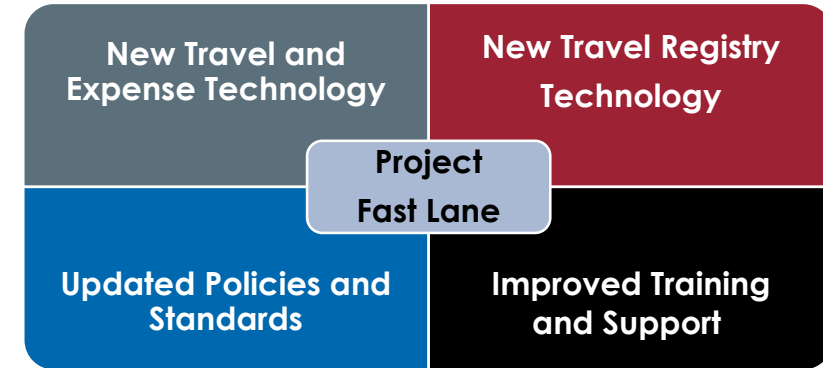
# Project Information

# Project Fast Lane - Summary



## Goal / Key Project Components

- Improve business & travel expense functions
- Update policies/standards, streamline processes, upgrade technology, enhance support



## Campus Involvement

- System-wide Project Team(s) and Governance
- Focus Groups
- Employee/departmental input and feedback



## Important Milestones

- **December 2022** – Project Fast Lane begins (policy/standards work underway)
- **April 2023** – Updated Travel Policy Board of Trustees vote
- **Summer 2023** – New T&E Process Pilot Rollout (participants and schedule TBD)
- **Fall 2023** – New T&E Process Campus Rollouts (schedule TBD)

# Campus Teams

Campus	Business & Travel Expense Team Policy, Standards, Technology	Travel Policy Core Stakeholders	Travel Registry Technology Team
Amherst	Frank Sousa, Denise Storm, Ray Rex, Patty Roper	Kalpen Trivedi	Andrea Drake
Boston	Patricia Overko, Chris Giuliani, Rebecca Hansen, Sharon DeLeskey	Shaun Morgan	Justin Comeau
Dartmouth	Suzanne Audet, Jillian George	Michael LaGrassa	Michael LaGrassa
Lowell	Sharon-Anne Mapes, Eileen Trott	Rick Wood	Eileen Trott, Fern MacKinnon
UMass Chan	Marcy Culverwell, Jenn Robinson, Amy Miarecki, Bethanne Giehl	Teresa Zash	Teresa Zash

# President's Office Team

Department	Representatives
<b>Innovation Team</b>	David Nero, Mike Greer, Jacob Sturtz, Mike Ricciardi, Jason MacFadyen, Mike Rizk, Holly Wang
<b>Employee Services Team - Travel and Expense</b>	Jeff Gull, Caitrin Merrill, Lori McKiel
<b>Unified Procurement Services Team</b>	Brian Girard, Rob Hyde, Amanda Onwuka, Claudia Cortes, Ashley Hunter
<b>Controller</b>	Patrick Hitchcock, Deirdre Delaney
<b>A&amp;F/Risk Management</b>	Matt Gorzkowicz, Christine Packard
<b>Treasury</b>	Andrew Russell
<b>Human Resources</b>	John Dunlap
<b>Office of General Counsel</b>	Alyssa Cherubino, John Chayrigues, Andrew Karberg
<b>UITs</b>	Shawn Skelly, Scott Szajna, Kristina England, Jason Rowe, Kathy Sawyer, Ben Collins, Frank Butler



# Project Fast Lane - Timeline

← Oct 22      Nov 22      **Dec 22**      Jan 23      April 23      June 23      Summer 23      Fall 23 →

<b>Concur Travel &amp; Expense</b>	Procurement	Contract/ Prep	Planning/ Kickoff	Setup, Integration, Testing			Pilot Phase	Campus Rollout
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<b>HX Global Travel Registry</b>	Procurement	Contract/ Prep	Planning/ Kickoff	Setup, Integration, Testing			Pilot Phase	Campus Rollout
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<b>Travel Policy &amp; Standards</b>	Initial Policy Draft	Stakeholder Review	Final Draft/ BOT Initial	Draft Standards	BOT Vote	Finalize and Communicate Standards	Roll Out
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<b>Business and Travel Expense Standards</b>	Draft updates		Issue update	
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<b>Travel &amp; Expense Support</b>	Planning	Transition to Employee Services Team		Develop training materials and support processes	New process employee training & support
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Communication & Campus Engagement

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# Campus Engagement & Communication

## Campus Focus Groups

- Targeted input and feedback from department representatives engaged in significant travel & expense activity
- Some by each campus, some system-wide

## Communication & Input

- Project Website ([umassp.edu/projectfastlane](http://umassp.edu/projectfastlane))
- Monthly Newsletters (emailed)
- Campus Town Halls
- System-wide Virtual Town Halls

# Thank You!

## Questions/Discussion

Project Fast Lane



## Stay Connected

<https://www.umassp.edu/projectfastlane>  
email--David Nero, [dnero@umassp.edu](mailto:dnero@umassp.edu)