Commentary: NAEP Annual Meeting—Just One Workshop

By: Neil Markee
Editor in Chief-Purchasing Link

If you were not among your peers at the 2016 NAEP Annual Meeting held in San Antonio Texas recently, you missed a heavy duty professional development opportunity. The theme was Mapping Procurement’s Future—Change—Improve—Execute and the multitude of workshops offered provided many opportunities to consider what you might do to upgrade the delivery of procurement related services on your campus. Maybe the most pressing challenge was deciding which “must go workshop” to focus on at each time slot. Added to that, much of the long lasting benefit
comes from the personal relationships you establish or nurture during the informal parts of the meeting that encourage face to face contact with fellow campus purchasing professionals. Relationships matter! Developing personal contacts around the country, across the border or over the oceans is one sure way to encourage thinking outside the box and avoiding having your problem solving skills cooped up or fermenting in a silo on your campus.

This was one of the best attended NAEP Annual Meetings in recent years. The general sessions and workshops were very well attended and I doubt many missed the many networking opportunities offered each morning and afternoon. Something I've never seen as a conversation starter in the continental breakfast area was the life size “dot surveys” for each member to answer. You would find yourself on each axis of the survey, grab a large sticky dot and place it on your demographic. Each morning offered a different benchmark.

After breakfast, each day’s program was kicked off by a thought provoking general session before the concurrent sessions began. The first morning the concurrent sessions offered a choice of six topics before lunch and six more after lunch followed by six after a refreshment break and then another six leading up to the opening of the exhibit area 5:00 to 7:30 pm. Right, that adds up to a choice of 24 workshops the first morning. Whew!

**Procurement Officers and CBOs as partners**

As this year’s meeting focus was procurement’s future and change I went to the workshop titled CBO Roundtable featuring Chief Business Officers from St. Edwards University, UT Health Science Center at San Antonio and Texas A&M University San Antonio. The moderator opened by asking, what were the most important issues facing CBOs at this time. Two issues surfaced. Diversity in all its aspects was the first suggested and next was installing and managing a process and structure that facilitates performance campus wide and enhances the institution’s ability to recognize the need for and to accommodate change. Under “structure,” the moderator steered the discussion to the CBO Procurement relationship.

The panel acknowledged that procurement often feels unconnected to the strategic decision making process and noted that procurement is generally not a participant in the strategic planning sessions involving CBOs. They agreed that procurement provides them with value add innovation and processes and that communication has to be better. I think it is fair to say that the CBO panel agreed that procurement could probably function more effectively if they were aware earlier of plans being formulated.

For example one of the roles of procurement is risk management. No, not the sort involved with slips and falls on campus but the risks the institution accepts in the acquisition process. Agreements can impose potentially costly obligations on the buyer. Some of these can prove very expensive during the life of the contract, product or service acquired. Hazardous materials might be a good example. The cost of compliance might be avoided or reduced if the potential issues and various alternatives were understood by all involved earlier. A participant noted that getting information to the CBO frequently involved passing it through others along the “chain of command” and each step slows the process. Generally the CBOs recognized that this was basically a communications problem that was adversely affecting the efficiency of the
process. I think the CBOs agreed that structure should not impede communications. And they agreed that the bureaucratic structure and layered reporting process common on campus was necessary to ensure that all those likely to be involved in carrying out the plan were kept aware of the actions of others. Why procurement and other departments frequently did not have timely access to information they needed seemed to be seen as an ongoing structural problem common to many organizations. We really didn’t come up with a solution to the communications problem but at least the issue was being discussed. The biggest “ah ha” moment was the consensus from the CBOs that they wanted and would encourage their procurement leaders to be innovative and take the risk to bring that innovation to them. They notably agreed that creating that relationship and taking the risk may bring many benefits in the long run.

Another Communications Link
As I listened to the discussion I was reminded of an effective approach used by a frustrated purchasing professional I knew some time ago. He was new on campus and realized major change was in the air. But soon became convinced procurement was being blindsided too often by plans that apparently had been under consideration at higher levels for some time and was looking for a way to provide useful input earlier in the process. Too often he first learned of a major projector or change when requisitions began to arrive and it was too late to make adjustments that would have reduced costs and provided better solutions. Given purchasing’s existing “gate keeper” image on his campus, he understood there was little chance of being invited to strategic institutional planning sessions any time soon. Looking for another effective approach, he began to attend or send representatives to departmental planning meetings when he could wangle an invitation. As purchasing earned a reputation among departmental administrators for being useful participants by providing thoughtful input and written summaries of what was discussed that could be circulated, they were invited to more such meetings. His overall goal was to make procurement’s involvement as close to indispensable as possible at the departmental level. His maybe “backdoor approach” succeeded. I don’t know if he ever got a seat “at the table” but he did succeed in influencing decision making by having, and upgraded his department’s image on that campus while improving service delivery.

Q&A
During Q/A time someone asked how CBOs evaluate purchasing performance day to day. CBOs are ultimately responsible for service quality and they acknowledged that taking any action or changing anything almost always involves purchasing as it is very difficult to do anything without buying something. One CBO noted that the number of valid complaints about purchasing service played a role. To my surprise, there was no mention of tracking the performance data a sophisticated computerized system might provide. A participant noted that purchasing should not allow itself to be seen as primarily a control function, an “agent of no”, a road block, an impediment to be overcome. The moderator asked how many purchasing departments represented at the work shop had their own departmental strategic plan. Maybe 1/3 of those present raised their hands. Next he asked, how many of the three CBOs on hand would welcome a strategic plan from purchasing. All nodded yes.

Summary
It’s fair to say that at least these CBOs understood that achieving service quality goals and realizing maximum benefit from the involvement of procurement professionals can depend on the quality and timeliness of the strategic planning information they receive from those who sit at the strategic planning table.

On many campuses a variety of assistants, directors, managers etc. report directly or indirectly to the CBO and they are dependent on those who are responsible for strategic planning for the information they must have to function most effectively. The size of the reporting group and the diversity of responsibilities probably rules out their routine direct involvement in strategic planning. But their collective expertise and their combined contribution to the realization of strategic goals requires that the efficiency of the communications link between them and their CBO be a major goal on campus. Is it on your Campus? Are their improvements purchasing might initiate to improve the transfer of information? Perhaps the information you need is available through better communications with the departments you serve.

See you in Reno in 2017? Start planning now perhaps by providing your boss with the impressive list of the workshop topics NAEP offered in San Antonio. And don’t forget the regional meetings this fall they are your next opportunity to meet with your peers.

What’s happening in your World?

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Passing of the Gavel Ceremony: Outgoing and Incoming NAEP Presidents

Posted By PLink Admin, Yesterday

Lisa Deal
Purchasing Director, University of Florida
Outgoing NAEP President, 2015-2016

My farewell speech—now I get to thank you for allowing me to serve as the NAEP President this past year. During the year, along the way, a fair number of folks asked me how it’s been, being president. Having had some time to think about it, I’d like to share a bit about my experience.

I traveled a lot, at least for me. I attended CHEMA, the Council of Higher Education Management Associations, with Doreen Murner, NAEP’s CEO. I met folks from all kinds of higher education associations: CUPA-HR [College and University Professional Association for Human Resources], Auxiliaries, Risk, Student Affairs, College Unions, Attorneys, Intermural Sports, Facilities and NACUBO—all customers we serve on campus. It was inspiring to meet my volunteer counterparts and their CEOs and to share our respective challenges. Some were similar to, others different from, the procurement challenges we all face daily. Speakers talked about the issues in higher education from a
national perspective, describing Washington’s take on Higher Ed. There were discussions about metrics and how challenging it is to benchmark across different kinds of educational institutions, because we’re different, even though we all educate students. There are no common definitions to benchmark across and no central repository for all the data. As an aside, it was clear that within CHEMA, Doreen and NAEP are highly regarded. We are fortunate to have her as our CEO.

So, more travel: I attended NACUBO and NIGP and, most recently, the NAEP Innovators Forum, hosted by Forum Chair Sandy Hicks from the University of Colorado. The white paper from the Forum, called “Enhancing Supplier Value & Performance,” is available to Members on the NAEP website. I learned so much participating and listening to colleagues. I was inspired to improve and focus more on contract management on our campus. Steven Neal, our University of Florida Contract Manager, is already at work implementing those ideas.

You know what else? I got to be a cover girl. Yes, I did. I made the cover of NAEP’s Educational Procurement Journal—and so can you. Just volunteer to run for NAEP President; let me know if you are interested. I really dislike having my photo taken but, I have to tell you, it was worth it. In addition to my picture, we got a photo of all of our office staff in my article and I can’t tell you how much campus-wide recognition we got out of that NAEP Journal issue. Immediate fame. My boss, the CFO, left a copy out in his office and many senior leaders on campus commented to me about it, which gave me an opportunity to use my elevator speech, talk about NAEP, and Procurement’s role on campus. Talk about an entrée to a seat at the table!

So, that’s some of what I did, but I learned so much more. Last year when I started in this role I was so nervous, maybe even afraid, that I wasn’t quite up to the task (following previous NAEP presidents like Cory Harms, Valerie Rhodes-Sorrelle, Bill Harris, Sandy Hicks), but I gave it my best shot and along the way I learned. I learned I could write a 200-word article every month. Some folks even asked me if they could share what I wrote, which led me to realize that I know more than I thought I did. The final thing I learned is that when you step up and try, you get out so much more out than you put in.

Last year someone told me that I should be paying NAEP for this opportunity and, you know what? They might be right, because this past year gave me the chance to learn and grow, to try new things, and then learn how to be successful doing them. That benefitted me, my institution, and, I hope, NAEP.

So, I did all that—but I couldn’t have done it without a lot of people helping and supporting me along the way. Some of the rock stars in our procurement world: Sandy Hicks, Nichol Luoma, Ted Johnson, Bill Probst, Steve Mack, Bill Harris, Judy Rees, Judy Smith, and many more I don’t have time to name—Thank You. A special shout out to Barry Swanson from University of Kansas, from whom I learned so much and enjoyed working with. In addition to the procurement professionals, I cannot say enough about the NAEP staff. It’s inspiring what this talented, dedicated group of eight professionals delivers to the membership. We are lucky to have them. Many thanks to the folks from Florida, my State University System colleagues and those from UF who supported me while I traveled and did the work of NAEP, and Judy Rees, who was a motivator in her enthusiasm for NAEP. Finally, I need to thank my kids, Victoria, who has just finished her sophomore year in college, and Chip, my
high school sophomore son, who made-do without me during all that NAEP travel, since I wasn’t there to cook his dinner. It’s a good thing he likes mac and cheese.

As much as all friends, family and colleagues need my thanks, the real thanks has to go to you, the Association and Membership, for giving me this opportunity. In addition to your continuing to learn and grow by being Members and participating in NAEP events, I encourage you to run for board office—regionally or nationally—so you can push the envelope on learning and growing. Put a little in, get so much more out. That’s a real deal (moderate pun intended). I hope you’ll let me know you are interested in volunteering to serve. I’d be happy to help you find where you want to take a risk, which has a serious return. Again, many thanks.

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Incoming NAEP President, 2016-2017

Posted By PLink Admin, Yesterday
Updated: Yesterday

Kelly Kozisek - NAEP President
Chief Procurement Officer
Oregon State University

Hi, I’m Kelly Kozisek and I have the great fortune to have been elected as the 2016 NAEP President. It’s with much enthusiasm that I embark on this exciting journey and I am grateful for the opportunity to serve this amazing association. If I can do half the job that Lisa did, I’ll consider the experience a success!

I’d like to start by acknowledging the advice of a special person who encouraged me to accept the nomination for this position and delve into what I see as one of the greatest benefits of getting actively involved in NAEP. It is through his simple but wise words that I am focusing on this year’s theme of Mapping Procurement’s Future, through the relationships that we develop with one another. This person was a colleague and mentor and, while he’s now retired, his advice continues to motivate this introvert to reach beyond her comfort zone by continuously building strong working relationships. I can still hear his words today. “Kelly, it’s all about the relationships,” he would say. He advised that it would be my relationships with my colleagues, staff, suppliers and executive leaders that would be the key to maneuvering our organization through tough challenges and propel us to progress in achieving our departmental goals and objectives. Oh, and by-the-way, just might result in my own personal growth. I recall our many one-on-one conversations, as I sought his advice on a variety of issues. At the end of these coaching sessions he would summarize with, “Kelly, it’s all about the relationships.” I got so tired of hearing that line and, because I didn’t take it seriously at first, soon my typical response was to give him a good-natured roll of my eyes and shoot him a look that said, “Yeah, whatever,” and we all know what “whatever” means, right? Since those days, something clicked. As I built and fostered my
relationships, I have had to confess to him that his statement really does hold a great deal of relevance and that he was right after all. Indeed, it’s all about the relationships.

Fast forward to the present. Here we are wrapping up the NAEP Annual Meeting, where many of you have established or reinforced relationships with colleagues, suppliers and NAEP staff. Members of NAEP have several things in common, whether it’s because we work for educational institutions, support professional development, are committed to our professions, or enjoy some level of involvement in NAEP. With these commonalities we can continue to foster our relationships with one another and expand our network. Why not build off of our Annual Meeting theme—“Mapping Procurement’s Future: Change, Improve, Execute”—by committing to contribute to NAEP in some manner and being a part of the continuous improvements that make this organization relevant? Everyone has something that they can contribute. Each one of you is mapping the future of procurement in your role as procurement professional and can make a positive impact on the NAEP Membership. Writing an article for the NAEP Educational Procurement Journal submitting a presentation for your regional meeting, offering a webinar idea to the NAEP staff, nominating a deserving Member for an award, volunteering to participate in a committee, or adding RFP documents to the online portal are just a few of the many ways you can change, improve, and execute through your contributions. It doesn’t have to be these standard volunteering activities. You may have your own ideas and suggestions on what would strengthen the Association. If you have ideas about what you can contribute and don’t know where to go with them, then start with me. I may not have all the answers, but through my relationships I can help you make those connections. The point is that everything you contribute will help map the future of NAEP and create a stronger Association, which will come full circle and benefit you and your educational institution.

Now to support the theory that it’s all about the relationships, I’d like to extend my gratitude to the many NAEP Members who supported me both as a member of the National Board and as procurement professional. Thank you, Jennifer Adling, Nancy Brooks, Mark Conley, Denise Finn, Corey Harms, Bill Harris, Sandy Hicks, Ted Johnson, Nichol Luoma, Charlene Lydick, Burr Millsap, Steve Mack, Mike McNamaara, David Pollard, Dee Ann Schneider and Barry Swanson. Thank you, Lisa Deal, for mentoring and preparing me for this role. You are a tough act to follow but your generosity and thoughtfulness have prepared me for this role. Thank you, NAEP staff members. Doreen Murner and her talented team are amazing. Their guidance and support are what enables us as NAEP Members to reap numerous benefits. Opportunities for professional development, a myriad of tools that are available to us, a network of procurement professionals who we can communicate with through the online forums, volunteering opportunities and programs such as this Annual Meeting are all valuable resources that wouldn’t be available without the NAEP staff.

Thank you to the 2016 Annual Meeting Program Committee. This team of volunteers contributed some of the most innovative ideas for generating a generous amount of presentation submittals in record time, as well as presentations submitted by many new presenters. As a result, we had many presentations by Members who had not previously presented at an Annual Meeting.

Thank you to my Oregon State University colleagues, staff and family. I have the great fortune of working with some of the most talented, hard-working
individuals. With the strength and diverse talent of the Procurement, Contracts and Materials Management staff we are making progress, despite the fact that we run lean as an organization. Thanks especially to Tamara Gash, whose contributions to OSU and NAEP are truly impactful. Finally, it's with great passion that I thank my husband, Tim, and my children, Megan and Nick. Tim, I appreciate that you continue to fully support me in my career because you see that I love it so much.

You might be pleasantly surprised with the relationships you develop if you journey into volunteering for this Association. Through the experience of making contributions to NAEP, you’ll create a network of colleagues and friends with whom you’ll have meaningful and long-lasting relationships. And after all, isn’t it really all about the relationships? Thank you and enjoy this final day of the conference!

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National Award Winners

Posted By PLink Admin, Yesterday

Winners of the 2016 NAEP National Awards, for service to NAEP during the year 2015, were announced on May 22 at a ceremony held during our Annual Meeting in San Antonio, Texas. We are proud to honor these Members who have demonstrated outstanding dedication and service to our Association. View their photos on our website.

Bert C. Ahrens Achievement Award
Our highest recognition, for outstanding contributions to NAEP over the lifetime of a procurement career.
Valerie Rhodes-Sorrelle, MPA, C.P.M.
Grand Valley State University

Neil D. Markee Communicator of the Year Award
For outstanding contributions to the profession through the written or spoken word.
Karen Harthorn
University of St. Thomas–Minnesota

Bob Ashby Mentor of the Year Award:
Recognizes an individual who has been a mentor to a NAEP member
Sandy Hicks
University of Colorado

Distinguished Service Award: Three Winners
For extraordinary service to an institution, the higher education community, NAEP, or the purchasing profession at a regional or national level.

Jennifer Miracle
Kentucky Community & Technical College System

Jennifer Adling, CTPM
Texas Tech University
- Judith Rees, C.P.M., A.P.P.
  Embry-Riddle Aeronautical University

- **Professional Perspective Award**
  Recognizes the best article in our quarterly magazine Educational Procurement Journal
  - Nancy Brooks, MPA
  Iowa State University
  For “Promoting Procurement to Internal and External Customers,” Summer 2015 issue.

- **Volunteer of the Year Awards: Three Winners**
  Recognizes achievements of Members who have contributed time and resources to benefit the overall goals of the Association.
  - Debbie Deacy
    University of La Verne
  - Tonia Lawson, CPPB, CPP, CPPM, CGPM
    Troy University, now with Bay County
  - Sandy Benoit
    University of Richmond

- **Young Professional in Procurement Awards: Three Winners**
  Recognizes efforts and contributions to procurement from outstanding young professionals who have fewer than 10 years of experience or are under 40 years old.
  - Sara Luther
    University of Nebraska–Lincoln
  - Houcine Chraibi
    University of Nebraska–Lincoln
  - Alex Orosz
    Duquesne University

- **Nancy Tregoe Scholarship**
  Kevin Holmes
  Oklahoma State University-Tulsa

- **2016 Sons & Daughters Scholarship: Two Winners**
  - James Beasley, Texas A&M University
    Son of Terrie Beasley, San Jacinto College
  - Colin Harthorn
    Son of Karen Harthorn, University of St. Thomas-Minnesota

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**A Fond Send-Off to Denise Finn, NAEP Senior VP, Moving to Private-Sector**

*Posted By PLink Admin, Yesterday*
It is with a mix of delight and regret that we announce that NAEP Board Member Denise Finn, CPPO, C.P.M., CPPB, is leaving the higher education field to accept a position with the Lee County Port Authority as a Purchasing Manager, leading the team at the Southwest Florida International Airport. Denise tells NAEP that it has been a long-term goal of her family to move to the beach and now they are able to do so. As of June 24, 2016 she is leaving the University of Kentucky, Lexington, where she served as Associate Director, Purchasing Division.

Denise has been an active member of NAEP (NAEB) for sixteen years, having served on/chaired both the Membership and Professional Development Committees. She has also served on two host committees, her first for the NAEP Annual Meeting in Las Vegas, while employed at Yavapai Community College, and in 2014 she co-chaired for the Louisville conference. She volunteered to be a first-time attendee leader for many years and has mentored numerous Members, assisting them with certification, continuing education, networking and how to move forward in their careers. Denise served on the NAEP Board of Directors for the last two years, most recently in the office of Senior Vice President for 2016/2017.

Denise Finn invites anyone who would like to keep in touch to look her up on LinkedIn or contact her at me.dk.finn@gmail.com.

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**Supplier Diversity Institute, July 31-August 2, Kansas City**

*Posted By PLink Admin, Yesterday*

Successful supplier diversity programs EDUCATE their senior leaders, internal departments, suppliers, and socio-economic communities. They EMPOWER their internal and external partners to advocate for procurement from diverse businesses. They find approaches to SUSTAIN their own energy and resilience. They collaborate with diversity and sustainability programs to build procedures and systems that maintain support for diverse suppliers.

Regardless of your staff’s experience within supplier diversity or the maturity of your diversity program, there will be a session for every level of procurement professional at the 2016 Supplier sharing best practices at one of the many Mind-Exchange tables.

July 31 - August 2, 2016
Embassy Suites Kansas City - Plaza
Kansas City, Missouri

**Hotel reservations:** The NAEP discounted room rate is $135 per night.
Roesia Gerstein Receives Prestigious UC Procurement Services Starlight Award

Roesia Gerstein recently received the Procurement Services Starlight Award in the category of Collaboration from the University of California. Roesia is a member of the NAEP Supplier Diversity Institute Planning Committee and, along with her volunteer committee colleagues, has been instrumental in planning the program for the upcoming institute this summer.

From the press release on Roesia's award: “You have demonstrated exemplary collaborative leadership on behalf of UC Berkeley, UC San Francisco and the UC system. Aligned with and furthering the UC system’s strategic procurement objectives, you have made significant contributions in data standardization, public service, and partnership with other diversity officers. You have initiated collaboration between UC campuses to standardize diversity coding which has not only reduced time in processing queries and filing federal reports, but expanded bid opportunities for more diverse businesses. Your collaborative efforts with city officials, organizations and businesses within the Richmond community have generated goodwill when assessing the sustainability of the Berkeley Global Campus at Richmond Bay. Additionally, your active engagement with campus diversity officers has expanded the integration of supplier diversity. We believe these contributions embody the characteristics of a successful professional who has achieved exemplary campus or systemwide collaboration.”

Congratulations Roesia.

Strategic Procurement Institute II: From Theory to Practice

August 28-31 in Denver

Practical, hands-on approaches to the four pillars of spend management,
including opportunity assessment, business case development, cost management execution and supplier relationship management. The primary objective of Strategic Procurement Institute II is to dig deeper into these pillars, to go from theory to practice. The Institute will focus on the practical application of each pillar using live data sets. In-class time will be concentrated on practica “how-to” road maps combined with extensive class discussion with your colleagues and facilitated in a manner to increase the value of what you can take back to your institution for immediate use.

- Hands on practice with real data sets and instructor led discussion of key learning points;
- Insights from colleagues, suppliers and leading practitioners;
- Networking opportunities and extensive class discussion on key topics; and
- Practical roadmaps and examples you can take home

This Institute is part 2 of the extremely successful Strategic Procurement Institute. Whether you attended part 1 or not, you will benefit from this course and the knowledge gained will increase the value of what you can take back to your institution and implement immediately.

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**T&E Spend Management In a Non-mandated Culture**

*Posted By PLink Admin, Yesterday*

*By Concur, an NAEP Director Sponsor at the 2016 Annual Meeting*

Across the country, universities are tightening their collective belts; combating shrinking endowments and stagnant state funding by accomplishing more with less. Although higher education procurement pros are successfully containing costs in multiple areas, many still struggle with Travel & Expense (T&E) spend.

Oftentimes, the expense process is paper-based, or divided among disparate systems, making it impossible to extract the data needed to negotiate rates with preferred suppliers. Yet, there’s resistance to change.

“I think there’s a misconception that travel is a very personal thing, particularly in a non-mandated culture. No one wants to tell faculty and staff what to do; so, most do nothing,” said Sandy Hicks, associate vice president and chief procurement
officer for the University of Colorado. “We’ve found that if you offer good systems and make doing the right thing the easy thing to do, you’ll get adoption.”

Hicks knows what she’s talking about. By implementing Concur Travel and Expense, engaging her travelers and using the collected data for rate negotiation, she’s already saved the university hundreds of thousands of dollars—and no one’s complaining.

**Start with the Right System.**
Before the University of Colorado started using Concur Travel & Expense, its processes were paper-based, manual and very disjointed. Now, everything is streamlined.

Airfare is booked through the Concur online travel tool, or a designated TMC agent. Instead of collecting paper receipts, the faculty submits everything electronically. Traveler reimbursement that used to take an average of three weeks is now handled in just one day. Most importantly, Hicks has access to meaningful spend data. “The first step to managing T&E spend is getting a system that not only makes things easier on your travelers, but gives you visibility into where the dollars are going,” Hicks said. “It’s amazing how many vendors will talk when you have a corporate control mechanism in place, and can prove your value as a buyer.”

But, how do you get travelers to actually use the system—and those preferred providers?

**Make It Easier to Use the System than to Go Rogue.**
“We’ve never told our travelers that they have to use Concur. However, if they don’t use our travel system, they have to prove that they paid less for their flights. And, they’re not reimbursed until after the trip,” Hicks said. “So, we’re not saying, ‘You can’t,’ but we’re giving our travelers good reasons to use our designated process.”

This strategy is working well. At the time of this writing, the University of Colorado has 93 percent compliance on airfare. The negotiated rates, and the increased use of preferred airlines, saved nearly $229k in FY2015.

That same type of strategy enhanced the use of the University’s corporate travel card, introduced a few years back, as a companion to the separate procurement card. Expenses from both of these cards flow directly into the appropriate accounting categories in Concur. Card rebates totaled $278k

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**The Starting Point: Getting on the Road to Effective T&E Management**
The question becomes: how do you move from a free-for-all T&E environment to a more effective, cost-saving model? Start with the basics:

- Set goals: look at your travel policy and establish baselines. Identify what’s the largest drain on your T&E costs, then work incrementally.
- Leverage new technology to make things easy for travelers, from booking a trip to automating as much of the expense report process as possible.
- Make it easy for infrequent travelers to use the system in place with just-in-time training.
- Use the data you collect to negotiate with airlines, hotels...
in 2015, with incremental increases each year.

**Get Continual User Feedback to Fine-Tune the Process.**

T&E management is a continuum. To keep adoption, and satisfaction high, Hicks solicits feedback through regular user surveys. “One of the questions we asked was ‘How often do you travel?’” Hicks said. “Not only did we learn that 66 percent of our travelers were infrequent travelers, but that these individuals were less satisfied than our more frequent travelers. We knew something had to change.”

Hicks and team developed a just-in-time, infrequent traveler training—a quick hit of information, delivered through Concur, when it’s needed most.

“When a user books an airline ticket, the system identifies if that person has traveled that year. If not, he or she gets an email asking: *do you have a travel card, have you downloaded the Concur mobile app and Triplt app*—all the things they need to get started,” Hicks explained.

Five days before the trip, travelers receive an email providing tips for their trip. On the last day of travel, they receive an email with information on how to process their expenses.

This approach has been a big hit with those infrequent travelers. Forty-three percent of recipients actually view the information, get a quick refresher and have a better user experience.

The Intangible, But, Most Important Benefit: Keeping Faculty and Staff Safe Beyond cost reduction, there’s one, far more priceless benefit to putting a comprehensive travel system in place. Knowing where every traveler is, at any moment, is critical to Duty of Care.

Unfortunately, no place or country is immune to crisis—be it an act of terror or an earthquake, a lone gunman or an Ebola outbreak. It’s critical to have a single access point for all traveler information—as well as contact information and home address. If an incident occurs, University leaders can get in touch with travelers quickly, assess the situation and determine next steps to get them back safely. In those situations, every minute counts.

In this case, investing in a comprehensive T&E solution not only saves costs, but could potentially save lives. That’s a value proposition that’s hard to ignore.
Now Available: View Annual Meeting Presentations and Photos

Posted By PLink Admin, Yesterday

Whether you attended the annual meeting or not, you can now review and download the available PowerPoint presentations. You must sign into the website to access the sessions. Additionally, you may view a slide show of selected scenes captured at our time in San Antonio and also view all uploaded photos to the event.

- View Slideshow
- View All Photos

NAEP extends a special congratulations to our scholarship committee for their work in raising money for the NAEP scholarship program. We raised over $4200 onsite in San Antonio! Thank you to everyone who donated an item for the raffle.

Regional Meetings Schedule

Posted By PLink Admin, Yesterday

District II
September 25-28, 2016
Pocono Manor, P
[ Register ]

Kentucky
September 25-28, 2016
Louisville, K
[ Register ]

**Great Plains**
September 25-28, 2016
Minneapolis, M
[ Register ]

**TOAL**
September 25-28, 2016
San Marcos, T
[ Register ]

**Great Lakes**
September 28-30, 2016
Indianapolis, I
[ Register ]

**District VI**
October 3-5, 2016
Seattle, W
[ Register ]

**Upstate New York**
October 4-7, 2016
Lake Placid, N
[ Register ]

**New England**
October 16-20, 2016
Springfield, M
[ Register ]

**TAGM**
October 23-26, 2016
Biloxi, MS
[ Register ]

**Carolina**
November 13-16, 201
Asheville, NC
[ Register ]

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**Quote of the Month**

*Posted By PLink Admin, Yesterday*

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“ The bad news is time flies. The good news is you're the pilot.”

— Michael Altshuler