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Case Study: Strategic Change Management & Strong Travel Program Roll Out

Background: Collegiate Travel Planners, a leading provider of travel management services specializing in higher education, partnered with a prestigious Division 1 (D1) university to overhaul its travel program in the winter of 2024. The university, with a large faculty, staff, and student population, sought to streamline its travel processes, improve cost efficiency, and enhance traveler experiences.

Challenge: The university faced several challenges with its existing travel program, including decentralized travel program with no legacy travel management company, fragmented booking processes, inconsistent policy adherence, and limited visibility into travel spend. Additionally, there was a need to standardize travel policies and procedures across various departments and ensure compliance with regulatory requirements.

Solution: CTP implemented a comprehensive solution to address the university's travel management needs:

- **Rapid Implementation:** CTP leveraged its expertise and resources to implement the new travel program in a timeframe of 56 days. This involved customizing the travel booking platform, integrating with the university's systems, and training staff on the new processes.
- **Training and Adoption:** Recognizing the importance of user adoption, CTP has developed a comprehensive Rollout Toolkit for our customers; including a go-to-market proposal, communication strategy, training plan, and survey approach. CTP and the university worked diligently on customizing their rollout to fit the unique culture and needs. CTP conducted a series of five training sessions, reaching a total of 1,000+ travelers, including faculty, staff, and administrators. These sessions covered topics such as booking procedures, policy compliance, and best practices for maximizing cost savings.
- **Mandated Travel Program:** During implementation, senior leadership within the university saw the hard dollar benefit and value of CTP's centralized travel program. To ensure consistency and compliance, the university mandated the use of the new travel program for all official university travel. This mandate was communicated clearly to all stakeholders, and support resources were provided to facilitate the transition.
- **Policy Standardization:** During implementation, CTP worked with the university on travel policy assessment and auditing, as the last review of their travel and expense policy occurred in 2017. CTP collaborated closely with university stakeholders to develop standardized travel policies and procedures tailored to the university's specific needs. These policies were designed to streamline booking processes, maximize cost savings, and ensure traveler safety and security.
- **High Adoption Rate:** Thanks to the comprehensive training and support provided by CTP, the new travel program achieved a remarkably high adoption rate among university travelers – prior to mandating. Organically, CTP achieved an 87% travel program adoption rate. Faculty, staff, and administrators embraced the new system, resulting in improved compliance, efficiency, and transparency.

Results: The implementation of the new travel program yielded significant benefits for the university:

- **Streamlined Processes:** The university's travel booking processes were streamlined and standardized, leading to greater efficiency and productivity.
- **Cost Savings:** The university realized substantial cost savings through improved policy compliance, negotiated discounts, and optimized booking practices.
- **Enhanced Visibility:** The university gained greater visibility into travel spend, allowing for better budget management and decision-making.
- **Improved Compliance:** Mandating the use of the new travel program ensured greater policy compliance and reduced the risk of unauthorized travel bookings.
- **Enhanced Traveler Experience:** Travelers benefited from a user-friendly booking platform, access to 24/7 support, and improved communication and support resources.

Overall, the partnership between CTP and the university resulted in a successful transformation of the university's travel program, positioning it for continued success in the future.

Case Study: Transforming Travel Management at a Major Texas University with CTP

Background

In April 2022, a large, Division I, R-1 private university in Texas embarked on a mission to overhaul its travel management program. The university, known for its high research activity and comprehensive academic programs, required a robust, efficient, and cost-effective travel management solution. Following a competitive and extensive Request for Proposal (RFP) process, the university selected Collegiate Travel Planners to partner with them in this endeavor.

Implementation

CTP Travel Services kicked off the implementation process, which was completed in just 4.5 months. The comprehensive implementation included:

- **Online Booking Tool for Individual Travel:** A streamlined tool to facilitate easy and efficient travel bookings for university staff, faculty, and students.
- **Mission Program Group Movements Configuration:** Tailored solutions to manage group travel for academic missions and other university-related activities.
- **Policy Consultation and Enhancements:** Expert advice to refine and enhance the university's travel policies to align with best practices and compliance requirements.
- **Stakeholder Meetings:** Regular meetings with leaders from various departments to ensure the travel program met the diverse needs of the university community.

Encouraging Program Adoption

To ensure successful adoption of the new travel management program, CTP implemented several engagement and training initiatives:

- **Onsite and Virtual Training Sessions:** Conducted comprehensive training sessions to educate the university community on using the new travel tools and understanding the updated travel policies.
- **Weekly Office Hours:** Provided dedicated time slots for campus community members to seek assistance and clarify doubts about the travel program.
- **Weekly Meetings with Travel Program Managers:** Maintained regular communication with travel program managers to address any issues and continuously improve the program.
- **Onsite Vendor Fair Participation:** Participated in university vendor fair to engage with the campus community and promote the travel management services.
- **Bi-Annual Strategic Business Planning Review:** Conducted strategic reviews to assess the program's performance, gather feedback, and plan for future enhancements.

Results After One Year

One year after partnering with CTP, the university experienced significant improvements and cost savings in its travel management program:

- **High Online Adoption Rate:** Achieved a 98% online adoption rate for compatible travel, indicating acceptance and use of the new online booking tool.
- **Hard Dollar Savings:** Realized savings of \$178,456.70, translating to an impressive 682.9% return on investment.
- **Cost Avoidance:** Managed to avoid costs totaling \$278,401, with 78.8% of air travel being booked at the lowest logical fare.
- **Low Travel Policy Exception Rate:** Maintained a travel policy exception rate of just 1.9%, demonstrating strong compliance with the enhanced travel policies.

Conclusion

The partnership between the university and CTP has been a resounding success. Through strategic implementation, comprehensive training, and continuous engagement, the university has transformed its travel management program,

achieving significant cost savings, high adoption rates, and streamlined travel processes. The collaboration continues to thrive, setting a benchmark for excellence in travel management within higher education institutions.

Case Study: Carbon Footprint Reduction through Strategic Carbon Offsets

Background

A large, private, Mid Atlantic University, renowned for its dedication to sustainability and innovation, has long prioritized environmental stewardship. Recognizing the substantial carbon footprint associated with travel, the University partnered with CTP, a leading travel management company, to monitor and mitigate carbon emissions through the strategic purchase of carbon offsets.

Objective

The primary objective of this partnership was to leverage CTP's advanced carbon emissions reporting tools to gain a comprehensive understanding of the university's travel-related carbon footprint. With this data, The University aimed to reduce its overall carbon footprint by purchasing high-quality carbon offsets, aligning its travel policies with its broader sustainability goals.

Implementation

Phase 1: Baseline Assessment

CTP conducted an initial assessment to establish a baseline for the University's travel-related carbon emissions. This involved:

1. **Data Collection:** Gathering data on all university-related travel, including flights, hotel stays, car rentals, and other transportation modes.
2. **Carbon Emissions Calculation:** Using CTP's proprietary algorithms to calculate the carbon emissions associated with each trip.
3. **Comprehensive Reporting:** Providing detailed reports that broke down emissions by department, travel mode, and destination.

Phase 2: Strategy Development

With a clear understanding of their travel-related carbon footprint, the University and CTP developed a targeted strategy to offset emissions:

1. **Carbon Offset Selection:** Identifying and selecting high-quality carbon offset projects that align with the university's sustainability values, such as renewable energy projects, reforestation, and community-based initiatives.
2. **Offset Integration:** Integrating carbon offset calculations into CTP's proprietary travel reporting dashboard, ensuring that every trip is offset appropriately.
3. **Education and Awareness:** Launching campaigns to educate faculty, staff, and students about the importance of carbon offsets and how they contribute to the university's sustainability goals.

Phase 3: Implementation and Monitoring

CTP integrated its carbon emissions reporting tools with the university's travel booking system to ensure real-time monitoring and accurate offsetting. Key steps included:

1. **Integration:** Seamless integration of CTP's reporting tools and offline and online travel booking platforms.
2. **Automatic Offset Calculation:** Automatically calculating the necessary carbon offsets for each trip and facilitating their purchase.
3. **Regular Reporting:** Providing quarterly reports to track progress and ensure transparency in offset purchases.

Results

Quantitative Outcomes

1. Carbon Emissions Offset: In FY24, the University successfully offset 100% of its travel-related carbon emissions.
2. Sustainable Projects Supported: Contributed to several high-impact carbon offset projects, including renewable energy installations and reforestation efforts.
3. Cost Management: Maintained overall travel costs while incorporating the expense of carbon offsets.

Qualitative Outcomes

1. Enhanced Reputation: The University's commitment to sustainability was bolstered, enhancing its reputation among prospective students, faculty, and partners.
2. Stakeholder Engagement: Increased engagement and awareness among faculty, staff, and students regarding the impact of carbon offsets and sustainable travel practices.
3. Leadership in Sustainability: Set a benchmark for other universities and organizations to follow in integrating carbon offsets into their sustainability initiatives.

Conclusion

The partnership between the University and CTP highlights the effective use of carbon offsets as a tool for reducing an institution's carbon footprint. By implementing a strategic approach to carbon offset purchasing, the University not only mitigated its travel-related emissions but also supported impactful sustainability projects globally. This case study underscores the importance of comprehensive data, strategic planning, and stakeholder engagement in achieving significant environmental goals.

Case Study: Compliance and Cost Savings with Fly America Act

Background: CTP specializes in providing travel management services tailored to the unique needs of higher education institutions. Recently, a traveler from a prestigious university needed to book a flight for an upcoming international conference while ensuring compliance with the Fly America Act, which requires travelers on federally funded grants to use U.S. air carriers for international travel.

Challenge: The traveler, a faculty member at the university, was tasked with attending an international conference funded by a federal grant. Compliance with the Fly America Act was essential to ensure that the travel expenses were eligible for reimbursement. However, the traveler faced the challenge of finding a suitable flight option that met the act's requirements while also balancing cost considerations.

Solution: CTP provided expert guidance and support to the traveler throughout the flight booking process:

- **Research and Assistance:** The traveler initially researched flight options independently and found a United Airlines flight priced at \$3700. Recognizing the significant expense, the traveler reached out to CTP for assistance in booking the flight.
- **Alternative Option:** CTP travel agent, familiar with the Fly America Act and international travel regulations, reviewed the traveler's requirements and flight preferences. The agent identified an Austrian Airlines flight option priced at \$1500, significantly lower than the United Airlines option.
- **Compliance Counseling:** Understanding the traveler's concern regarding compliance with the Fly America Act, the agent provided counseling and clarification regarding the act's requirements. The agent explained that under the Open Skies Agreement, travelers could book flights operated by foreign carriers, such as Austrian Airlines, and still be compliant with the act.
- **Cost Savings:** Armed with this knowledge, the traveler opted to book the Austrian Airlines flight, realizing substantial cost savings of \$2200 compared to the United Airlines option. The agent facilitated the booking process and ensured that all necessary documentation and compliance requirements were met.

Results: The collaboration between the traveler and CTP resulted in a successful outcome:

- **Compliance with Fly America Act:** By booking the Austrian Airlines flight, the traveler remained compliant with the Fly America Act while attending the international conference funded by a federal grant.
- **Significant Cost Savings:** The traveler saved \$2200 by opting for the Austrian Airlines flight, demonstrating the value of expert consulting and guidance provided by CTP.
- **Gratitude and Satisfaction:** The traveler expressed gratitude to the travel agent for their assistance, acknowledging the substantial cost savings achieved while ensuring compliance with regulatory requirements.

Overall, the successful navigation of the Fly America Act requirements combined with significant cost savings underscored the effectiveness and expertise of CTP in meeting the unique travel needs of higher education clients.

Case Study: Leveraging Travel Data to Drive Return on Investment

Background

In 2018, a prestigious, private R1 institution partnered with CTP to enhance its travel management program. The institution, renowned for its high research activity and comprehensive academic offerings, required a sophisticated, cost-effective solution to manage its extensive travel needs. By FY23, the institution's total travel volume had reached over \$10 million, encompassing airline, hotel, car rental, bus charters, and rail expenses.

FY23 Achievements

In FY23, CTP achieved significant cost savings and optimization for the institution, demonstrating the value of a strategic travel management partnership.

Total Cost Avoidance: \$1,252,129.03

- Refunded Tickets: \$612,284
- Unused Ticket Management: \$458,377.46
- Airline Contract Savings: \$133,532.35
- Hotel Contract Savings: \$47,935.22

Additionally, CTP identified key cost avoidance areas and implemented initiatives to further enhance savings and efficiency for FY24.

Key Initiatives and Solutions

Initiative 1: Lowering Airline Exchange Costs

- **Challenge:** The institution's exchange rate for airline tickets was 9.8%, significantly higher than the benchmark of under 5%. Frequent changes to airline reservations were driving up costs.
- **Solution:** CTP recommended encouraging travelers whose plans were subject to change to consider refundable tickets. This approach was supported by detailed data analytics and insights from CTP's reporting tools.
- **Outcome:** This initiative added an additional \$140,758.05 in cost avoidance for FY23. By shifting towards refundable tickets, the institution reduced unnecessary exchange fees and improved budget predictability.

Initiative 2: Increasing Online Adoption

- **Challenge:** Despite using an online booking tool for five years, the institution's culture remained reliant on travel agent staff, resulting in a low online adoption rate of just 44.9%.
- **Solution:** CTP proposed targeted departmental arranger training sessions to encourage the use of the online booking tool. These sessions were designed to demonstrate the efficiency and benefits of the tool, addressing any hesitations or misunderstandings.
- **Outcome:** Although this initiative is ongoing, initial feedback and engagement levels suggest a positive shift towards increased online adoption, which is expected to reduce service fees and improve booking efficiency in FY24.

The partnership between the institution and CTP Travel Services has proven to be highly beneficial, delivering significant cost savings, enhanced efficiency, and improved travel management practices. By addressing key challenges and implementing strategic solutions, CTP has helped the institution optimize its travel program and achieve its financial and operational goals.

Case Study: Duty of Care During a Global Pandemic

In times of crisis, it is paramount for public and private entities to ensure the safety and secure passage for travelers away from home. A public university, home to 30,000 students, trusted the CTP team to assist students requiring return from study abroad, most of whom did not book the original trip with CTP.

In response to the COVID-19 global pandemic in early 2020, the CTP team and the University were presented the need to enact business continuity protocols and support travelers affected by rapidly changing travel restrictions and public health guidelines.

Specifically, the University required:

- Emergency consultation and booking from Level 1 and 2 countries impacted by the Coronavirus affecting approximately 500 travelers
- Most affected travelers were unprofiled in this unmandated program setting
- As repatriation of affected students required one-way travel originating overseas into the US, likely within 72 hours or less, CTP established a passcode for traveler authorization and processing. This allowed these bookings, which would normally be flagged for fraudulent activity review under normal circumstances, to proceed
- Distributed the latest carrier information, capacity updates, and rebooking channels to our agent teams to ensure the most robust availability and best routing options presented to each student in light of specific country of departure restrictions
- Agents handled this situation with sensitivity, directing students, as well as parents and loved ones, to local outlets regarding information on quarantine processes or regulations specific to the students country of departure
- Provided students and parents and loved ones escalation contacts both from the University and from the CTP team

CTP assisted with 264 bookings for returning study abroad students in just 5 days, and received the following feedback:

- Mother of a student abroad says, "You are a blessing in such a difficult time. I do not know what we would have done to get her home."
- Study abroad student says, "Your agents were amazingly helpful, gave me great options, and got me ticketed right away!"
- Father of a student abroad says, "God bless you! We have been completely unable to contact the airlines through all of this."

In responding to this unprecedented global event, the University is reviewing travel policies to increase adoption and visibility for future bookings.

From the Travel Manager:

"I'd like to personally thank Patrick, Jeff, and all the dedicated CTP agents and staff who brought our study abroad students home, even when CTP didn't make their original travel plans... We've had several units reach out about moving their college or department travel to CTP. Once we've returned to our offices, I'll be inviting Patrick, Jeff, and Morgan back to campus to review the exceptional customer service CTP provided during this pandemic, what CTP could have done to minimize the chaos if the University had a managed travel program in place, and what we can do to better prepare ourselves in the future."