EXECUTIVE SUMMARY
Travel and Reimbursement Process

BACKGROUND
Current policies and procedures for travel and reimbursement are convoluted. There are several forms and several signatures on each form that need approval even before the traveler starts a trip. The same happens when the trip has been approved; and for post-trip reimbursement. The time invested, and the number of people involved in the process is a clear cause of concern to the OEC. We have deemed the system inefficient (and very costly if we consider the time investment by all Adelphi employees related to the process, including faculty). One area of main concern is how flights are booked using the Concur system. However, something that we consider perhaps to be more critical is that employees are shying away from traveling because of the frustration with the current process.

Travel is a key and vital tool for promoting Adelphi’s name and recognition, scholarship, creative work, and the intrinsic international nature of education. As an example of this frustration, one of our interviewed faculty wrote “Current procedures are greatly flawed, create faculty and administrative frustration, and often breaks down. Degrades work environment between faculty, administrative assistants, and Dean’s Office”.

OVERVIEW OF WHY PROCESS IS IN NEED OF IMPROVEMENT
We have considered that the inefficiency of the process is not rooted on negligence of the employees involved in the process, but on the complex layers of policies and redundant loops that a traveler needs to go through in order to travel, the rigidity of purchasing a flight, the disconnect between departments and the lack and inconsistency of training and education of the departmental administrative assistants and other key personnel. We would like also to note that less criticism was observed towards the reimbursement process.

PROPOSED STEPS THAT NEED TO BE TAKEN TO IMPROVE PROCESS
- Implement a Purchasing Card Program (P-card)
- Automate travel authorizations and purchase orders
- Develop and implement a formal training program
- Implement an annual survey