Problem Solving Template (PST)

Improvement Title: Travel Revamp

Participant Names

Date Started 5 Oct 2023	**Date Completed** 12 Mar 2024

Department & Office
IP and Executive Office

Vision of Excellence: *DMAIC* ③
- Single source of truth for travel process
- Clear checklist of activities for traveler to complete
- Traveler details are captured efficiently, without duplication
- The right staff have access to the right information
- Decision making and action is empowered at the lowest level possible
- All necessary steps to travel are completed without mistakes or unnecessary added costs
- Payment is seamless for the traveler
- Fewest people involved

Problem statement: *DMAIC* ①
- 1. Current travel process is cumbersome with many stakeholders and many documents which takes valuable staff time. The process is not clear, centralized and travelers are sometimes unsure which decisions they can take.
- 2. There is no clear flow of information between relevant stakeholders. With Kelci's departure, no clear owner is left to drive or own the process to communicate to the organization so work is duplicated or forgotten, and costly mistakes can be made.
- 3. Flights must be booked with Key Travel using credit cards. Not all staff have a company credit card. As a result, travelers borrow credit cards from the few staff who have them. This results in the credit card owner having to make the booking and process reconciliation in Certify. When there are last minute bookings, this creates added pressure to find an employee with a credit card. Often there is extra time spent chasing the traveler for info needed to reconcile. This wastes the employee's time doing admin for travel that they are not related to.

Direct and root causes: *DMAIC* ②
- There is not a centralized payment process > The past 2 years we didn't have a Finance structure and staffing to support on time payments of Key Travel invoice so had to use individual credit cards
- Info and procedures are documented in multiple places or not documented at all > Different travel types have different needs, though some core activities exist
- 'Unclear parameters for decision making for cost principles and donor compliance (eg. FAA) > Cost principles for private funds not defined. Cost principles for grant funds not documented for easy staff reference

Changes proposed/made: *DMAIC* ④
- Clear process owner
- Travel Request Form instead of PR
- Travel Planner Checklist
- Travel docs folder
- Central credit card for flights
- Travel calendar and hand carry requests
- HR collecting personal info (int'l)
- Personal Responsibility Form (int'l)
- Security Briefing & Country Overview meeting format (int'l)
-

Key Performance Indicator	Before	Target	After	Improvement %
Time spent by non-travel related staff booking/reconciling flights	1 hr	0 hr	(anticipate 0 once new CC is on file)	(anticipate 100%)

Improvement: *DMAIC* : see full PPT here from Launch meeting ⑥
- Process owner established- Exec Office
- Single source of truth for process- FOM Section 9
- Documented agreement on budget via TRF, both domestic & int'l trips; internal controls with Budget Holder approving flight via Key Travel
- Travel Planner checklist single source of truth for action items, details on how to complete and clear responsibilities
- Centralized filing of travel documents
- Central payment via CC on file, reconciled by Exec Office
- Improved instructions on self-service Key Travel booking website
- Centralized booking of Tigard hotel and car rental by Exec Office
- Personnel data appropriately stored with HR with correct access, no need to resubmit if no changes
- Appropriate visibility on trips by Security and others with Travel Calendar and TRF
- Improved checks and balances for required security trainings/briefings to be completed
- Country Overview and Security Briefing standard template, hand off between PO and Security Mgr
- Fly America Act comprehensive guidance in FOM, clearly marked on Key Travel portal
- Travel Carry Requests tracker in visible place
- Personal Responsibility Form gives clear sign off the Traveler accepts risks of travel

	Who	When	Notes	⑤
Determine payment method		13 Nov 23	In all of this ensure good socialization with stakeholders to co-create	
Develop Cost Principles & FAA guidance		15 Nov 23		
Develop new process flow		15 Nov 23		
Develop personal info collection flow		1 Dec 23		
Develop checklist and other tools		12 Dec 23		
Update FOM Section 9		20 Dec 23		
Refine and test tools in soft launch		Jan-Feb		
Develop Security/CO overview SOP and template		1 Mar 24		
Confirm process with Key Travel		1 Mar 24		
Lead HQ Launch Meeting		12 Mar 24		