

EXAMPLE: Competition Package

Process Palooza

The Great LSS Race Competition Package



Process: UC San Diego's Associated Students (AS) Student Employee Travel Request Process

UC San Diego's [Associated Students \(AS\) department mission](#) is to:

"... facilitate and encourage students to grow and develop through their involvement in student government, its services and auxiliaries. We promote student engagement in all areas of campus life through leadership, advocacy, and service in order to build and strengthen our community".

On average, there are 500 AS student employees who work for AS that are eligible to travel, and when they do, they must complete the **AS Student Employee Travel Request** process. AS Student employees travel for business purposes (i.e. conferences, UCOP committees and leadership, community outreach) as it aligns with their employee role. And they may travel individually, in small groups, large groups of 100+.

AS student employees are either elected to 1-year positions or are hired to support an elected student position. All positions are paid.

Elected: Voted in for a 1 year term (approximately 30 positions), with elections in the spring (*a spring to spring term*).

Support Elected: Hired by the elected position (approximately 470 positions).

While some students may come back for a second year, it is almost always in a different role. Of the 500 positions, potentially 250 may return in a new role and seldom with any experience with the travel request process.

For the most part AS student travel takes place:

- Fall: 65%
- Winter: 15%
- Spring: 15%
- Summer: 5% (while there less travel in summer, this is the time when student employees are new to their jobs and this process)

It is important to note that over the last year AS student employee travel has increased because:

There are more student employees

UC Office of the President has increased student representation and meeting frequency

A manual form and process, this process ensures travelers have received approval, that funding is in place, and that travel adheres to UC and UC San Diego policies and mitigates risk.

Problem Statement

Although Associated Students requires 21 days advance notice for AS student employee travel, confusion with the form and process results in 50% of submissions missing the submission deadline.

In addition, nearly 100% of those submitted require change or update, with approximately 80% requiring update (i.e. missing information such as an address) and 20% requiring change (i.e. mode of travel or other logistic changes). Changes require that all reviewers who have already seen the form must see it again.

For first time travelers, having not used the process, 100% experience a change at every process step.

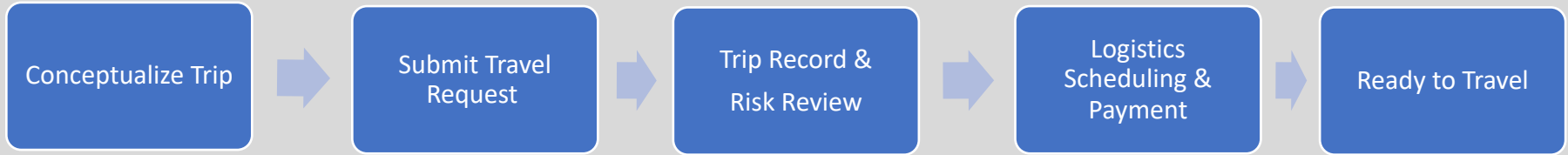
All changes and updates prolong the process and usually result in rushing requests which delay others.

In some cases, the process may prevent a trip from occurring.

If we do not address issues with the form and process we risk student fulfillment of their employment and potentially increase risk by rushing requests through without proper safety precautions.

Keep in mind, in seeking efficiency improvements (such as increasing accuracy of information, completion in a timely manner), we must ensure student safety.

About the Process



The process begins when an AS student employee and/or advisor identify (conceptualize) a travel opportunity to pursue.

With this in mind, there is a travel deadline which requires the process be started 21 days before the travel date. However there is some rush travel that is mandated (i.e. sudden UCOP requests, other travel that cannot be anticipated) that needs to be rushed. Similarly, when there are changes to the request, the request can fall behind and become a “rush” to complete.

A manual form and process, communications are predominantly verbal or in email.

The process does not include processes conducted by departments to fulfill their process step (such as SLBO’s steps to cut a Purchase Order).

The process ends before the student actually travels.

AS Student Employee Travel Request Form

A copy of the form is included in you competition package

Travel Request Form: AS, SPACES, SSC, GSA or Student Organization

How to use this form: Complete and submit the form to your advisor no later than 21 days before the travel date. Your advisor will provide you with a copy of your request form to the travel vendor so that the vendor can be completed and processed after the trip has concluded.

TRAVELER/LEADER INFORMATION	
Name:	Social Security #: _____ Age: _____
Employed by the University? <input type="checkbox"/> Yes <input type="checkbox"/> No	U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, Visa type: _____
Personal Address:	Phone: _____

EVENT/TRIP/CONFERENCE INFORMATION	
Funding Source:	<input type="checkbox"/> Associated Students <input type="checkbox"/> Graduate Student Association <input type="checkbox"/> SPACES <input type="checkbox"/> Other: _____
Type of Travel:	<input type="checkbox"/> Individual <input type="checkbox"/> Group Travel: 3 or more (Please complete page 2 indicating all attendees)
Event/Conference Name:	Destination (City, State): _____
Purpose of Trip:	Departure Date & Time: _____ Return Date & Time: _____

LOGISTICS	
Payment Method (Check One)	Est. Cost
<input type="checkbox"/> Reimbursement <input type="checkbox"/> TEP Card <input type="checkbox"/> SLBO <input type="checkbox"/> Other	_____
CONFERENCE DATES:	_____
LODGING:	_____
Hotel Name:	Hotel Location (City, State): _____
Check-In Date:	# of nights: _____
MEALS/PARKING/TAXIS/OTHER:	_____
Description:	Expected amount incurred: _____
TRANSPORTATION:	_____
<input type="checkbox"/> Private Automobile <input type="checkbox"/> Fleet Services <input type="checkbox"/> Provide copy of insurance and driver license & list all passengers on page 2	
Driver's Name:	Driver's License #: _____
Car Insurance Name:	Policy #: _____
Destination:	Miles from UCSD (Attach copy of MileQuest): _____
<input type="checkbox"/> Airplane <input type="checkbox"/> Train <input type="checkbox"/> Bus	Departure City: _____
Departure Date & Time:	Returns Date & Time: _____

ADDITIONAL TRAVELER'S INFORMATION	
Full Name	US Citizen? Y or N If no indicate Visa Type
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

SLBO USE ONLY	
Trip #:	Traveler ID: _____ Index #: _____
Date:	Date:

Form 6122 5/16

Questions student employees have about the form:

- How is this information used?
- Who sees this information?
- Students opt to not travel because of the form: Undocumented students will not travel due to the requirement to complete the “is the student a US citizen” field.
- Why do they ask “is the student a US citizen”? Oftentimes this field is not completed by the Trip Leader and delays or ends travel plans.
- Why can’t we do this online? The AS Student Employee Travel Request form is currently only available in paper format
- Why do they ask for the social security number? Why doesn’t the student PID work? Students are concerned with the requirement for a social security number?

Process Actors




Process Stakeholder: Provides investment and support as the process sponsor.




Process Owner: Is accountable for the process, for this process the process owner is also the manager, ensuring in the daily management, reports and communications.

Process Actors

- **Trip Leader:** Are AS student employees, that organize the travel from identification, research, submit the request, and fulfill required steps.
- **Advisors:** Provide support and provide guidance to AS student employees.
- **Executive Assistant:** Is the process owner works closely with all trip leaders
- **Student Life Business Office (SLBO):** Provide purchase orders (as needed) and create My Travel records.
- **Risk Management:** Ensure student safety and conform with Health & Safety Policy
- **Vendors:** Offer service, meet vendor requirements, paid in timely fashion.

Meet the Process Actors – What they do, their needs and pain points

Trip Leader: AS Student Employee	Advisors: AS student advisors (there are 6)	Executive Assistant, AS Administration
<p data-bbox="121 803 569 833">Sam Okana, Trip Leader, VP External</p>  <p data-bbox="121 1015 180 1040">Role</p> <ul data-bbox="121 1052 548 1190" style="list-style-type: none"> • Trip Leader • VP External • Advocates on behalf of UCSD at system-wide events <p data-bbox="121 1198 201 1224">Needs</p> <ul data-bbox="121 1235 516 1261" style="list-style-type: none"> • Easy way to travel for his job. <p data-bbox="121 1269 260 1295">Pain Points</p> <ul data-bbox="121 1307 516 1372" style="list-style-type: none"> • Last minute travel is difficult. • Form and process is unclear. <p data-bbox="121 1380 558 1406">Location: 4th Floor, Price Center East</p>	<p data-bbox="623 803 957 833">Elaine Madison, AS Advisor</p>  <p data-bbox="623 998 682 1024">Role</p> <ul data-bbox="623 1036 1304 1141" style="list-style-type: none"> • Provides historical context/background to students • Bridges ongoing projects across annual staff changes, connects with campus partners, explains policies <p data-bbox="623 1149 703 1175">Needs</p> <ul data-bbox="623 1187 1325 1360" style="list-style-type: none"> • Easy form and process for students to follow. • Clarify what Exec Asst. does and what advisor do. • To ensure student travel is safe. • To ensure students travel aligns with job and what was agreed upon. <p data-bbox="623 1369 762 1395">Pain Points</p>	<p data-bbox="1373 803 1814 833">Jerrold Marshall, Executive Assistant</p>  <p data-bbox="1373 1015 1432 1040">Role</p> <ul data-bbox="1373 1052 2032 1239" style="list-style-type: none"> • Process Owner • Familiar with the different components of AS and overall purpose and goals of students' positions • Assists with established programs and processes in AS, including student work travel <p data-bbox="1373 1247 1453 1273">Needs</p> <ul data-bbox="1373 1284 1969 1349" style="list-style-type: none"> • To make travel happen. • Strong partnerships with process participants. <p data-bbox="1373 1357 1514 1383">Pain Points</p> <ul data-bbox="1373 1395 1860 1421" style="list-style-type: none"> • Inefficient process and unclear form.

<p>Hourly Rate: \$12.00 <i>*Blended hourly rate (estimate)</i></p>	<ul style="list-style-type: none"> • There isn't one place to access travel info. • Changes are frequent and require quick turnaround. • Clarify everyone's roles and responsibilities. <p>Location: 3rd and 4th Floors, Price Center East Hourly Rate: \$40.00 <i>*Blended hourly rate (estimate)</i></p>	<ul style="list-style-type: none"> • Rework due to changes or errors. • Onboarding staff annually to the process. <p>Location: 4th Floor Price Center East Hourly Rate: \$30.00 <i>*Blended hourly rate (estimate)</i></p>
<p>Student Life Business Office (SLBO)</p>	<p>Risk Management</p>	<p>Vendors</p>
<p>Kristy Wilson, Student Life Business Office (SLBO)</p>  <p>Role</p> <ul style="list-style-type: none"> • SLBO Analyst, 1 of 2 positions • Adhere to SLBO policies and procedures <p>Needs</p> <ul style="list-style-type: none"> • Accurate information in a timely manner. • To know funding is approved. • To create My Travel (Connexus) <p>Pain Points</p> <ul style="list-style-type: none"> • Purchase Orders (PO) are needed but information is not provided. • Changes to requests cause rework. <p>Location: 3rd Floor Price Center East Hourly Rate: \$35.00 <i>*Blended hourly rate (estimate)</i></p>	<p>Harrold Phillips, Risk Management</p>  <p>Role</p> <ul style="list-style-type: none"> • Risk Management, 1 of 2 people in role • Review Trip Leader Field Operations Planner (FOP) • Write personalized recommendation to trip leaders • Ensures compliance with Health & Safety Policy <p>Needs</p> <ul style="list-style-type: none"> • Field Operations Planner (FOP) in time to properly review. • Accurate Field Operations Planner (FOP). • Student health and safety come first. <p>Pain Points</p> <ul style="list-style-type: none"> • Frequent travel request changes requires numerous reviews per request, increases workload. <p>Location: Torrey Pines Center South Hourly Rate: \$45.00 <i>*Blended hourly rate (estimate)</i></p>	<p>Sharon Kai, Vendor</p>  <p>Role</p> <ul style="list-style-type: none"> • Hotel Vendor <p>Needs</p> <ul style="list-style-type: none"> • Traveler information • Easy way for travelers to make reservations <p>Pain Points</p> <ul style="list-style-type: none"> • PO Process takes a long time • Students can't sign hotel or other contracts • Credit card authorization since student does not have travel card. <p>Location: local, national, international Hourly Rate: \$30.00 <i>*Blended hourly rate (estimate)</i></p>
<p>Students travelling with Trip Leader</p>		
<p>AS Student Employee Travelers</p>	<p>Role</p> <ul style="list-style-type: none"> • Travelers 	



Needs

- For travel to be easy.

Pain Points

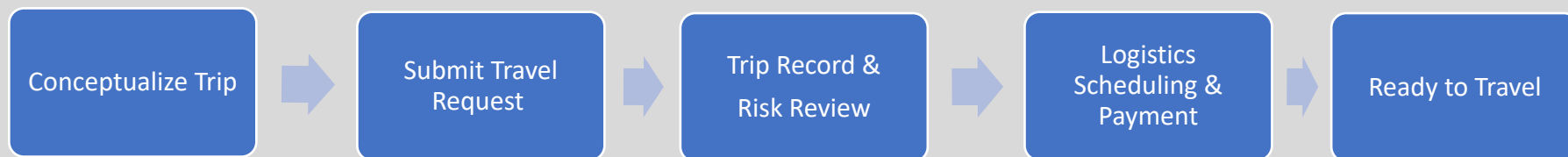
- We are concerned about the travel form asking for our social security number and if we are a US Citizen.
- It is not clear how the form is used (and by whom) and why some questions are asked.

Location: 3rd Floor Price Center East

Hourly Rate: \$11.00

**Blended hourly rate (estimate)*








Now that you've met the actors, here's a high-level process flow with steps



Steps/Activities	Steps/Activities	Steps/Activities	Steps/Activities	Steps/Activities
<ul style="list-style-type: none"> • Trip Leader and/or Advisor identify travel need/opportunity. • Trip Leader and Advisor align proposed trip with job. • Trip Leader conducts research and cost estimates. • Trip Leader shares trip plans and estimates with Advisor to gain approval to proceed. 	<ul style="list-style-type: none"> • Trip Leader may request help to understand the form and process. • Trip leader completes and submits the paper form to the Executive Assistant. 	<ul style="list-style-type: none"> • Executive Assistant asks Trip Leader to complete and submit the Field Operations Plan (FOP) form to Risk Management. • Trip leader submits FOP. • Risk Management reviews FOP and provides recommendation. • Trip Leader's travel plans may change based on recommendation. • Executive Assistant submits travel request form to Student Life Business Office (SLBO). 	<p>If Purchase Order (PO):</p> <ul style="list-style-type: none"> • PO request submitted to SLBO • SLBO provides PO to Executive Assistant • Executive Assistant gives PO to Trip Leader. <p>If Hotel:</p> <ul style="list-style-type: none"> • Trip Leader works with Executive Assistant to charge Hotel to TEP card. <p>If Airfare</p>	<ul style="list-style-type: none"> • Trip Leader and Travelers are ready to travel.

- SLBO creates a My Travel record (trip #).
 - SLBO gives Executive Assistant the My Travel trip number.
- If Mileage,
- Trip Leader provides Executive Assistant with traveler details.
 - Executive Assistant confirms traveler details comply with mileage requirements.
- If Trip Record, Executive Assistant uses My Travel (Connexus) to book flight.
 - If trip is rushed, Executive Assistant uses TEP card to book flight.

Process Narrative

<p>Sam Okana Trip Leader</p> 	<p>Elaine Madison, AS Advisor</p> 	<p>Jerrold Marshall, Exe. Assistant</p> 	<p>Kristy Wilson SLBO</p> 	<p>Harrold Phillips Risk Mgmt.</p> 	<p>Sharon Kai Vendor</p> 	<p>AS Student Employee Travelers</p> 
---	--	--	---	---	---	---

AS student employee Trip Leader Sam Okana identifies a travel opportunity.

A group of 15 students are going to a conference in Seattle. They will meet at campus and carpool to the airport. Once they arrive in Seattle they will take airport transportation to the hotel. While at the conference the group will hire a bus to take the group to a University some distance away for a day-long tour. In addition, during the conference breakfast and lunch is provided but they need to arrange catering at the hotel for the groups for dinners.

Sam knows that he can discuss the trip next week at his weekly hour-long meeting with his Advisor Elaine. At their meeting they discuss the trip and how it aligns with the student traveler's work responsibilities. Elaine provides a verbal approval to pursue.

Sam's schedule is busy but he researches trip logistics and costs such as when to fly, what airline, where to stay, food options. He calls the bus company and arranges a quote in about 15 minutes. One of his employees spends about 20 minutes researching airlines online and then speaks to the airline for 10 minutes to get an estimate for the 15 travelers. However, the hotel group rates and catering require multiple emails and phone calls which take about 2 hours of work and up to 3 days to complete. He opts to do this work himself. Sam, like most Trip Leaders, usually only get one quote for logistics.

At the next scheduled hour-long weekly meeting (or in passing when Sam is in the office), Sam and Elaine meet to review the budget and Elaine provides a verbal approval.

Sam picks up a paper Travel Request form at the Executive Assistant Jarrod's office on the 4th floor (Price Center East), fills it out, includes the bus invoice and leaves it on Jarrod's desk. When submitted 60% of forms submitted are partial/incomplete and 50% of forms require changes after submission. Incomplete forms and/or changes to the form can delay the request making it an urgent or rushed request. When requests are rushed they delay other requests that are in progress. Jarrod may or may not already know about the trip.

In this case, our trip leader didn't ask for assistance but most, usually in summer (80% of the time) ask for help. While there are instructions on the form, currently, there is a lot of in person assistance needed by the Executive Assistant and advisors for student employee travel. This can take anywhere from 10 minutes to one hour on average depending on the student employee's need.

Jarrod reviews the travel request and notes that it has been submitted 24 days prior to travel, meeting the 21 day deadline. Currently 50 % are submitted late. Late requests usually take priority, delaying other travel submissions. He checks the form for errors and missing information. He notes that the hotel catering invoice is missing as is the personal driver information needed to carpool to the airport. He takes 10 minutes to email Sam to let him know he needs the hotel catering quote and the driver information for carpooling. Next Jarrod takes 5 minutes to scan the form and store it in an email Travel folder.

Fortunately, Sam is in the office and it takes him 5 minutes to walk over and give Jarrod the hotel catering invoice. They discuss the trip and hotel catering invoice for 30 minutes. Jarrod takes 5 minutes to walk the form and 2 invoices downstairs to Student Life Business Office (SLBO) (downstairs) where he discusses with Kristy for about 15 minutes the need for two purchase orders and a My Travel trip number in order to book the airfare.

It takes Kristy one to 1 ½ weeks to cut the POs and send them to Jarrod. Jarrod is in a meeting for one hour but once it is over, he sees the POs and takes a couple minutes to forward them to Sam. Sam has a busy schedule so it isn't until the next day that he sends the POs to his vendors. Approximately one-third (1/3) of all trips require a PO. Kristy phones Jarrod to let him know that the My Travel trip number was created. Approximately 50% of all travel requests require air travel (flights) and creation of a My Travel trip record, otherwise, SLBO usually creates the records post travel to facilitate reconciliation.

Jarrod takes about 5 minutes to send Sam an email to complete Risk Management's Field Operation Planner (FOP). There are two FOP forms, a short form and a long form geared for different types of travel. It takes Sam about 30 minutes to figure out which FOP to complete and submits it to Harrold. Within one to one and a half weeks, Harrold replies to Sam with recommendations. For this trip no change are required. Only about 3% of all FOP forms require a change. Sam takes about 2 minutes to send Harrold's response to Jarrod.

Carpooling to the airport is okay since it is under 150 miles. Sam takes about 15 minutes to send an email to the carpool drivers asking them to provide proof that they are 21 years (or older), have a valid driver's license and valid automobile insurance. With student schedules it takes about a week for Sam to gather all the paperwork. Sam takes 10 minutes to give all the documentation to Jarrod to confirm all the drivers meet requirements. Jarrod reviews the paper work in 15 minutes and also stops by Elaine's office to quickly (about 10 minutes) confirm that mileage is okay for this trip. With Elaine's approval, Jarrod takes 5 minutes to send an email to Sam to let him know all is in order. Less than 5% of all trips involve students driving to events.

Jarrod schedules to meet with Sam to make hotel reservations. After a bit of back and forth in email they plan to meet the next day. Jarrod gives the hotel a credit card (TEP) to reserve the room/s and requests the hotel send an authorization form to serve as payment when Sam and his travelers check in and out of the hotel. The call takes about 45 minutes to one hour. The hotel sends Jarrod the authorization form who completes it in about 15 minutes and faxes it back to the hotel. Jarrod logs the credit card (TEP) action in an excel spreadsheet he uses to record all his AS TEP purchases. When Jarrod receives the hotel confirmation email, usually within a day, he takes a couple minutes to forward it to Sam. It takes about 1 minute to store the confirmation in his email Travel folder.

To purchase airfare for all travelers, Jarrod realizes some of the traveler information is not on the form. He takes 5 minutes to email Sam to request the missing information. It takes Sam about 30 minutes to send an email to the travelers requesting the missing information. It takes about 5 to 7 working days for Sam to gather the information. Sam takes 10 minutes to email the missing information to Jarrod. Using the Connexus system, it takes Jarrod four hours to purchase the 15 airline tickets for the travelers. Once purchased, the Connexus system sends an email confirmation to both the Jarrod and Sam. Unless told otherwise Sam and his travelers are ready to travel on their trip.

Process stakeholders - their influence, interest and expectations

Stakeholder Analysis

Stakeholder/ Stakeholder Group	Influence	Interest	Expectations
VC Student Affairs (Juan Gonzalez)	High: Subsidizes Associated Students, makes Associated Students Administration program possible.	Overall student experience.	Great student experience.
Associated Students Senate/Student Sustainability Collective/SPACES	High: Provides funding from student fee allocations	Student leadership, representation, benefits for student and UC San Diego.	Strong student success and community, efficient and responsible utilization of student fees
AVC Associated Vice Chancellor Student Life (Patty Mahaffey)	High: Can easily influence process	Overall student experience.	Associated student travel should be easy and comply with all University of California and UC San Diego policies and practices.
Director Associated Students Administration (Heather Belk)	High: Can easily influence process	Efficiency, safety of students, establishing positive work relationships with students	Associated student travel should be easy and comply with all University of California and UC San Diego policies and practices.
Christian Walker, Process Owner, Associated Students	High: Can easily influence process	Efficiency, safety of students, establishing positive work relationships with students, ability to report success	Student travel is conducted easily, as planned and safely.

Associated Students Student Employees	Medium: Can affect process through their participation, adherence and feedback.	To understand opportunities and process.	To easily receive help, act autonomously, to be able to easily conduct pre-trip approvals and planning.
Associated Students Advisors	Medium: Their work with student at the conceptualize trip phase can influence process.	Students are able to travel	Kept in the loop, comply with policy, is easy for students.
Student Life Business Office	Medium: Can influence payment and My Travel requirements	Travel is funded and approved.	Timely and accurate information.
EH&S Risk Management	Low: Provide recommendation	Travel aligns with policy	Students are safe when they travel.
Vendors	Low: Services are an outcome of the process.	Purchase their services.	Reservations, communications, payment