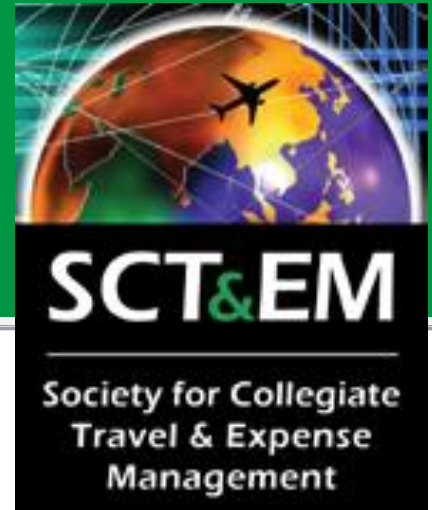


24th Annual Conference & Trade Show

Agenda

Westin New Orleans Canal Place

www.usc.edu/sctem/2010



SUNDAY 9.26.10

10:00AM - 5:00PM REGISTRATION | WESTIN 12th FLOOR

3:30- 5:30PM ROUNDTABLE DISCUSSIONS | CRESCENT BALLROOM

REFRESHMENTS SPONSORED BY: ORBITZ FOR BUSINESS

Whether you are a first-time SCTEM attendee or a long-term participant, you'll find the SCTEM roundtable a terrific way to network with colleagues, get answers to your questions, and catch the latest travel and expense management news. Each roundtable is associated with a hot topic, including a "pick your own hot topic," and is facilitated by an industry expert. Participants will rotate from table-to-table, gather a wealth of information, and be ready to tackle the next few days of education. Sample hot topics include:

- Corporate Card Program Efficiencies
- Group Travel & Meeting Planning Practices
- Academic & Athletic Airline Contract Negotiations
- Hotel Industry Forecasts
- New Travel Program Design Options
- Rental Car Agreement Strategies

7:00-10:00PM OPENING RECEPTION AND SILENT AUCTION | RIVERBEND TERRACE

SPONSORED BY: ENTERPRISE HOLDINGS, INC.

A long-standing SCTEM tradition takes place during the Opening Reception: **A Silent Auction!** To make this event most exciting, we have asked attendees – both schools and suppliers – to donate silent auction items. When you arrive at the hotel, please drop off your auction item at registration. Then for the evening event, put on your school or company gear (shirt with logo) and come join us for this fun event!

MONDAY 9.27.10

6:45- 7:30AM RUN/WALK IN THE FRENCH QUARTER | MEET IN WESTIN LOBBY (11th FLOOR)

8:00- 8:45AM BREAKFAST | CRESCENT BALLROOM | SPONSORED BY: CONTINENTAL AIRLINES

MONDAY 9.27.10 - Continued

8:45-10:15AM WELCOME AND GENERAL SESSION A | **BALLROOM II**

Journeying through the Historical City of New Orleans: Buddy Stall Welcomes SCTEM to New Orleans

Gaspar J. ("Buddy") Stall, *Author* | [Buddy Stall's New Orleans](#)

Enjoy time with author and historian Buddy Stall as he takes us on a historical journey through the winding streets of New Orleans in this introduction to the Crescent City. Find out little known facts regarding this unique locale including why it has captured the hearts of its residents and so many others across the globe. "Sometimes unique, sometimes unusual, sometimes unbelievable, but always entertaining and historically accurate," [Buddy Stall's New Orleans](#) enlightens readers with little-known facts about the Crescent City - facts to relish and to share with friends as well as with guests to the city. Through his writings, teaching assignments, radio and television appearances, guest lectures, and personal appearances, Buddy Stall has taught the history of Louisiana to more people than any other person. One of the most sought-after speakers in Louisiana, Buddy Stall has captivated thousands with his delightful talks, proving his assertion that "New Orleans' and Louisiana's history is much more entertaining than fiction."

10:15-10:45AM TRADE SHOW AND BREAK | **BALLROOM I** | **SPONSORED BY: ANTHONY TRAVEL**

10:45-12:00PM EDUCATIONAL SESSION BLOCK 1

1A **Aligning Travel with Procurement:** A Debate over the Pros and Cons (**Terrace Room**)

Robert Zartarian, *Director of Travel Services* | Yale University
Susan Storb, *Travel Manager* | University of Pennsylvania
Kindra Jordan, *Director of Travel Services* | Willamette University
Lee Loden, *Director BSW Travel Management* | University of Texas at Austin

Engage in what will surely be a lively debate among veteran university travel administrators about the pros and cons of having travel report under the auspices of procurement versus other central administrative units (finance, comptrollers, administration, etc.). Although there is a growing trend in and outside of higher education to position travel management under procurement, there are opposing views to the benefits of this reporting relationship. Those curious about whether this structure influences traveler behavior, saves money, improves service, and ultimately produces a best-in-class travel program will find great value in attending this session.

1B **Preventing Fraud and Misuse:** Practices for Corporate Card Programs (**River Room**)

Gonca Latif-Schmitt, *Managing Director* | Global Transaction Services, Citigroup

Use of purchasing, ghost, and travel cards (corporate cards) in higher education has soared over the past 10 years, given that corporate cards have proven to be a highly efficient payment option. The most successful corporate card programs include a multi-faceted approach to reducing exposure to risk, and use both preventive and detective controls which include proper identification of service users, authorization, confidentiality of data, accountability, and incident detection and response. The areas of potential misuse of the program, include account statement exceptions, account spending exceptions, SIC exceptions, declined authorizations, and account dispute reports. There are many ongoing security threats to any corporate card program, and having an understanding of the potential issues will help prevent or reduce exposure to risks such as identity theft, scams, and phishing. Best practices in data mining techniques and protection policies that can protect your card program, as well as client card management system recommendations for monitoring spend levels, are shared in this program.

MONDAY 9.27.10 - Continued

1C Mitigating International Travel Risk: Recent Disasters – such as those in Haiti and Chile – are Reminders of the Need for Institutional Strategies (Cotton Room)

Margaret Riley, *Director of the Office of Study Abroad* | Duke University
Chris Boroski, *Director of Corporate Risk Management* | Duke University

An increasing number of education institutions are taking steps to ensure that international travel risks are mitigated, and to respond to international emergencies should they occur. While this can be a daunting task, Duke University, in response to this challenge, has formed an International Travel Oversight Committee (ITOC), made up of university stakeholders such as those from Risk Management and Global Studies. In this session, presenters will discuss the formation of the committee as well as the responsibilities and benefits of having such a committee. Following the advent of many recent natural disasters – most notably in Haiti, Chile, Mexico, and China – the value of having an institutional strategy for mitigating risk and responding accordingly continues to escalate.

12:00- 1:00PM LUNCH | CRESCENT BALLROOM | SPONSORED BY: CITIBANK

1:00- 2:15PM GENERAL SESSION B | BALLROOM II

Leading a More Productive Work and Personal Life: The Benefits of Being Encircled by Those with “Refrigerator Rights:” People, who Can, without Asking Permission, Open Your Fridge and Make a Sandwich

Glenn Sparks, PhD, *Author | [Refrigerator Rights](#) and Professor of Communications* |Purdue University

The current generation of Americans has lived through a virtual revolution of communication technology that has changed daily life, for both good and ill. While there are good aspects of technology and these have been eagerly accepted, many Americans have struggled, sometimes unknowingly, with the ill effects. For example, many Americans are constantly plugged in, looking at screens of one sort or another, and this habit has led many to live and work in an increasingly-isolated state. Exacerbating this ill effect is the fact that Americans frequently relocate, regularly change jobs, habitually focus on their careers, and, as a result, often lack a sense of community. The latest research in medicine, psychology, sociology, and communication all converge on the finding that America’s “isolation culture” is ruining the emotional and physical health of many Americans and is restructuring certain aspects of the American life in undesirable ways. In his address, Dr. Glenn Sparks, author and professor, offers guidance on how attendees can reverse this trend by nurturing critical associations. Dr. Sparks uses the term ‘refrigerator rights’ to refer to people who can comfortably open each other’s refrigerators, scan the contents, and then help themselves. He provides evidence that suggests that those encircled by people who have “refrigerator rights” are more relieved of stress, have fewer signs of depression, and lead more productive work and personal lives.

2:15- 2:45PM TRADE SHOW AND BREAK | BALLROOM I | SPONSORED BY: CITIBANK

MONDAY 9.27.10 - Continued

2:45- 4:00PM EDUCATIONAL SESSION BLOCK 2

2A Saving in the Neighborhood Market: The Benefits of a Local Hotel Program (River Room)

Alexis Graves, *Travel Accounting Administrator* | University of Southern California

There is a tendency for those in travel administration to look far and wide for cost-saving opportunities. After all, taking care of business in far-off places is part of the job. But this session conducted by the University of Southern California is a reminder of the opportunities in an institution's own backyard, specifically with regard to local hotels. Over the past 10 years, USC's local hotel program has evolved and is now a benefit to a long list of constituents including business travelers, employment candidates, consultants, athletes, parents, alumni, and families of USC hospital patients. The USC program epitomizes what an institution can do with its collective volume and in a non-mandated environment. In addition to great prices -- all negotiated through a competitive RFP process -- USC's local hotel program includes a direct billing option (only for business travelers, of course), amenities (free/reduced parking, Internet, breakfast, etc.), and even some shuttle service. As a three-campus university with diverse needs, starting and then nurturing this program was no easy task. But through a nifty website, campus tradeshow, commission to contract travel agencies, and other marketing efforts, the program has become very well used. In fact, travelers are rarely -- if ever--able to find a better deal.

2B Implementing Expense Reporting Systems: A Case Study of Two Institutions (Terrace Room)

Christopher Juneau, *Senior Director of Segment Marketing* | Concur Technologies
Marguerite Gustkey, *Manager of Travel Services* | Penn State University

When it comes to controlling travel costs, institutions of higher education have unique requirements and no two institutions are exactly the same. Concur Technologies has helped collegiate travel and expense administrators around the world automate their entire travel and expense management processes -- from travel procurement all the way through to employee reimbursement -- to gain control, increase compliance and enhance visibility into spending. Attend this session to discover the lessons learned and the benefits achieved by two universities after they've automated the management of this significant area of employee spend.

2C Being Green Is Easy: The Positive Impacts of Conducting Virtual Meetings in Higher Education (Cotton Room)

Samantha Chan, *Director of Conference, Catering and Marketing Services* | UCLA
Dr. Robert Gilbert, *Sustainability Coordinator* | UCLA

Recent economic conditions have led to creative approaches to conducting business meetings and conferences. Current climate changes and the fragile condition of the ozone layer have also caused organizations to look at new alternatives to physically attending a meeting. Using grassroots efforts, colleges and universities are making strides in reducing their carbon footprints and in reducing institutional costs. Attending or organizing a virtual meeting can assist with both budget-reduction and sustainability efforts. Evidence suggests that collaborative, in-person exchanges are necessary, but that the use of evolving and more accessible technology is an increasingly viable option that travel and expense managers can encourage their institutions to use. In this session, experts from UCLA will share how their institutions have embraced this new practice -- for many good reasons.



MONDAY 9.27.10 - Continued

4:00- 4:45PM GENERAL SESSION C | BALLROOM II

Benchmarking: Trends in Higher Education throughout FY 09/10

Ian Thomas, *Partner* | Academic Travel Consulting
Debbie Gulliver, *University Travel Manager* | Michigan State University

In this general session, Academic Travel Consulting and SCTEM will present the results of a study that identifies the extent to which institutions of higher education have adjusted travel and expenditure policies in response to unstable financial times. The study will also provide benchmarking results that describe how institutions are managing current issues such as ancillary fees, green travel, and automated systems. While SCTEM conducts a benchmarking survey on an annual basis, this year's study promises to provide data that is relevant and timely.

7:00-10:00PM DINNER RECEPTION | BOURBON VIEUX ROOM (BOURBON STREET) | SPONSORED BY: AMERICAN EXPRESS CORPORATE SERVICES

Meet in Westin Lobby (11th Floor) at 6:45 pm or at restaurant anytime after 7:00 pm. Maps and address printed on 'At-A-Glance' summary agenda.

TUESDAY 9.28.10

6:45- 7:30AM RUN/WALK IN THE FRENCH QUARTER | MEET IN WESTIN LOBBY (11th FLOOR)

8:00- 9:00AM BREAKFAST | CRESCENT BALLROOM | SPONSORED BY: DELTA AIRLINES

9:00-10:15AM EDUCATIONAL SESSION 3

3A Accounting for Ancillary Fees: Practices for Managing Costs Associated with Baggage, Extra Legroom, Pillows, and More (Terrace Room)

Aaron Kelling, *Executive Vice President* | AirPlus International
Mark Nasr, *Senior Manager, Merchandising, Ancillary, & Revenue* | Continental Airlines
Christopher Juneau, *Senior Director of Segment Marketing* | Concur Technologies
Marguerite Gustkey, *Travel Manager* | Penn State University

Accounting for ancillary fees imposed by most airlines for baggage, extra legroom, aisle seats, standby, changes, on board meals, drinks, and pillows has become a nightmare for those responsible for processing travel reimbursements and/or managing airline contracts. Today, there is little data to support these fees, making it difficult to know exactly what was purchased and how much it really costs to travel by air. At first, it appeared these ancillary fees were being imposed by airlines on a short-term basis to offset airline expenses associated with record-high crude oil costs and to make up for losses associated with lackluster traveler volumes during the recession. In the third quarter of 2009, U.S. airlines, on a collective basis, earned \$1.9B in ancillary fees. Given the boost these fees have given to the bottom line, it is clear that these fees are not only here to stay but will continue to proliferate. In this session, the moderator and panel – all stakeholders working on solutions to account for these fees -- will share some of the emerging practices.

TUESDAY 9.28.10 – CONTINUED

3B Using the Kualo Financial System for P-Cards: The Elimination of Paper Receipts and the Automation of Workflow (Cotton Room)

Mary Wilson Many, *Corporate Card Program Administrator* University of Southern California
Ian Thomas, *Senior Business Analyst* / Vivan Tech (Kuali Affiliate)

As use of Purchasing Cards among employees at the University of Southern California (USC) rapidly increased, so did the piles of supporting documentation. With receipts, statements, and other P-Card documents scattered around campus in various conditions (some scanned at the department level and others stored in local filing cabinets; some faded or yellowed from age and others missing completely), USC needed to find a solution for its 4,000 P-Card holders. Fortunately, just as the piles of paper were about to reach a tipping point, USC began to harness the capabilities of the Kualo Financial System, and is now using KFS to manage three primary P-Card processes: uploading of receipts and other support documents, routing of approvals, and entering of business purposes. Ultimately, KFS will serve as the University's repository for all P-Card transactions and support documentation. The Kualo Financial System is a suite of open-source software modules designed by the higher education community for deployment across academia: www.kuali.org <<http://www.kuali.org>>. KFS can be used by any institution and its P-Card process is not card-provider specific. SCTEM attendees unfamiliar with Kualo and/or the KFS P-Card process will learn about some of the most cutting edge technology now available to the academic community, and will watch how USC modified KFS P-Card functionality to gain significant efficiencies.

3C NCAA Travel and Expenditure Regulations: What They Are and Why They Matter to the Institution, Travel & Expense Administrator, and Travel Supplier (River Room)

John Anthony, *President* | Anthony Travel
Keith Martin, *Vice President of Finance* | NCAA

This session will broaden your awareness of NCAA travel and expenditure regulations, identify the general purpose for having these rules, and explain how you can provide an added level of service and value to your athletic department by understanding more than just the basics. The underlying purpose of NCAA travel regulations is to 'level the playing field' and to make certain no team has been given any unfair advantages. To provide a few examples, NCAA regulations restrict coaches from traveling on certain days, limit the number of recruiting coaches traveling at any given time, and prohibit student athletes from retaining frequent flier miles. Sanctions against an institution for non-compliance can be severe, and, correspondingly, great effort is made by coaches and athletic department business /compliance officers to adhere. Whether you're a university administrator or travel supplier, attending this session will help explain why servicing an athletic department's travel is anything but 'slam dunk.'

10:15-10:45PM TRADESHOW AND BREAK | BALLROOM I | SPONSORED BY: STA TRAVEL

10:45-12:00PM EDUCATIONAL SESSION BLOCK 4

4A Complying with Payment Card Industry (PCI) Requirements: Approaches in Higher Education (River Room)

Dennis Reedy, *Managing Director, Treasury Operations* | Indiana University

Given the era of electronic commerce, Payment Card Industry (PCI) Data Security Standards were created to protect credit card data and other personal information, and to ultimately alleviate vulnerabilities and prevent fraud. The establishment of these Standards has caused institutions to reevaluate transactional relationships with vendors and to add important language to both current and new contracts with credit card companies, banks, and vendors such as travel agencies, hotels, and on-line booking companies. This session will provide an overview of PCI Data Security Standards, explain how meeting these requirements affects the transfer and storage of transactional data, and what approaches institutions of higher education are taking to comply.

TUESDAY 9.28.10 – CONTINUED

4B Taking Consultancy Advice: An Example of a Successfully Redesigned Payment, Purchasing, and Travel Department (**Terrace Room**)

John Anthony, *President* | Anthony Travel
Rob Kelly, *Director, Procurement Services* | University of Notre Dame
Jim Knight, *Managing Director* | Huron Consulting Group, Inc.

The practice among senior executives in higher education to ask for outside advice likely increased over the past two years, as a growing number of institutions urgently searched for innovative ways to be cost effective and efficient. In other words, it's likely that your boss or your boss's boss has recently been in discussions with a consulting firm regarding an efficiency project at your institution or even within your travel, purchasing, and payables department! In this session, a representative from the Huron Consulting Group, Inc. -- a leading higher education financial management and strategy consulting firm -- and an executive from the University of Notre Dame explain how they worked in tandem with each other over the past few years to make efficiencies in travel, procurement, and payables. This session will be of interest to those wondering how consultants and senior executives evaluate operations and identify efficiencies, what opportunities emerged as part of the assessment, and how the institution now is putting into practice the recommendations.

12:00- 1:30PM LUNCH | CRESCENT BALLROOM | SPONSORED BY: US BANK

1:30- 2:45PM EDUCATIONAL SESSION BLOCK 5

5A Optimizing Corporate Card Rebates and Customer Service: Tips that Improve Amounts and Number of Kudos (**Terrace Room**)

Aaron Snyder, *Vice President Western Region* | American Express Corporate Cards

Although universities and colleges are emerging out of the recession at various stages and in different conditions, most comptrollers and chief financial officers in higher education agree that their institutions will not return to the fiscal health of the pre-recession years for a very long time. This means that administrators cannot go back to doing business as usual, and are expected, more than ever before, to keep their ears to the ground in search of new ideas. Corporate cards are certainly not new payment tools in higher education. However, a veteran executive from one of the corporate card industry's largest providers makes clear that most schools have the opportunity to increase their rebates and, concurrently, offer enticing services to cardholders. This session will be light on decks and presentations (thank goodness), but heavy on dialogue and interaction. It will focus on why attendees came to New Orleans: Peer-to-peer networking and best-practices sharing. The session's goal is to help travel and expense administrators add value to their corporate card programs and, in turn, make them indispensable to their institutions. After this session, attendees will view differently both their organizations and the corporate card opportunities.

5B Understanding Social Networking: The Role of Social Media in Travel (**River Room**)

Jan Lofgren, *Vice President of Account Management & Deployment* | Orbitz for Business

Triplt, Taxi Magic, and Food Finder are some of the many examples of social media now available to business travelers. In this session, travel and expense managers will gain an understanding of the strategic importance of social media, its growing influence, and impact on managed travel programs. By understanding social media, travel and expense managers can harness their opportunities and avoid the challenges.

2:45- 3:15PM TRADESHOW AND BEVERAGES | BALLROOM I

TUESDAY 9.28.10 – CONTINUED

3:15- 4:45PM GENERAL SESSION | BALLROOM II

Leading the Charge: Insights into Travel and Expense Management

Tony D'Astolfo, *Vice President, Worldwide Sales* | Rearden Commerce
John Harner, *Director of Travel Services* | Indiana University
Mel Trudeau, *Executive Vice President, Business Development* | Farelogix
Shelly Terry, *Senior Director, Corporate Sales* | Sabre
Brad Seitz, *President and CEO* | Topaz International
Tom Tulloch, *Senior Vice President of Sales* | TRX, Inc.

End the conference on a lively note. Join your colleagues in a fast-paced wrap up in which experts will debate the most important travel topics of the day. Modeled after "The McLaughlin Report," members of the panel will get only one minute to succinctly state their point of view on a myriad of topics of interest to all of us in the travel and expense management world. In addition to keeping even the most loquacious to only 60 seconds, the moderator will ensure that every topic is discussed from every angle. You're sure to come away from this session with some great insights on how to keep your program ahead of the curve.

4:45- 5:00PM THANK YOU AND WRAP UP | BALLROOM II

At this brief wrap-up, SCTEM will reveal its 2011 destination. As a thank you for attending, a set of round trip airline tickets will be raffled off at the wrap up by the SCTEM board. A lucky SCTEM attendee will be able to take a companion and travel within the continental United States!

**6:30-10:00PM DINNER RECEPTION | CALCASIEU RESTAURANT (HISTORIC WAREHOUSE DISTRICT) |
SPONSORED BY: CONCUR TECHNOLOGIES**

Meet in Westin Lobby (11th Floor) at 6:15 pm or at restaurant anytime after 6:30 pm. Maps and address printed on 'At-A-Glance' summary agenda.

WEDNESDAY 9.29.10

8:00AM-12:00PM

VISITING TULANE UNIVERSITY: The Firsthand Story of Hurricane Katrina's Affects on a University's Administrative Infrastructure **(MEET 8:00AM IN LOBBY 11th FLOOR)**

Anne Banos, *Vice President, Administrative Services* | Tulane University
Robert Hailey, *Senior Associate Vice President, University Services* | Tulane University
Greg Southworth, *Assistant Vice President, EHS and Emergency Management* | Tulane University

Visit the Tulane University campus in New Orleans and learn firsthand from administrators how their university's infrastructure was tested by Hurricane Katrina. In this session, attendees will hear what administrative tools worked (P-Cards) and what did not work (paper check) as flood waters devastated almost all office buildings. The administrators will also share with SCTEM how Tulane has since modified its crisis management policy to be better prepared for the next (and somewhat inevitable) large-scale disaster. While five years have passed since August 29, 2005, Katrina has had lasting impacts. Perhaps one of Katrina's biggest impacts was that the hurricane forced universities and companies around the world to develop emergency preparedness programs that are reasonable and durable. Consider this visit to Tulane an extreme educational opportunity!