

SUNDAY 9.13.09

10:00-5:00PM REGISTRATION

4:00-5:30PM ROUNDTABLE ORIENTATION

Whether you are a first-time SCTEM attendee or a long-term vet, you'll find the SCTEM roundtable orientation a terrific way to network with colleagues, get answers to your questions, and catch the latest travel and expenses 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 two days of education. Sample hot topics include:

- Corporate Card Program Issues
- Receipt Retention and Threshold Requirements
- Hotels Negotiations
- TSA Changes
- Airlines Consolidations
- Start-up Travel Program Challenge

7:00-10:00PM OPENING RECEPTION AND SILENT AUCTION

SPONSORED BY: NATIONAL CAR RENTAL AND ENTERPRISE RENT-A-CAR

A long-standing SCTEM tradition takes place on Sunday evening during the Opening Reception: **A Silent Auction!** To make this event most exciting, we asked attendees – both schools and suppliers – to donate silent auction items. Typical items from schools include sweat shirts, T-shirts, signed balls, etc. Suppliers add exciting items such as hotel nights, airline tickets, rental cars, and much more! This is a lively event and a way for conference attendees to become acquainted. Get ready to demonstrate spirit and enthusiasm while you compete in a friendly environment for special auction items. When you know the auction item you will donate, please email a brief description and estimated value to the following SCTEM Advisory Board Member: Margaret Gustkey, Penn State University, at: mlf2@psu.edu. Auction items can be delivered to the registration booth upon arrival in Los Angeles.

MONDAY 9.14.09

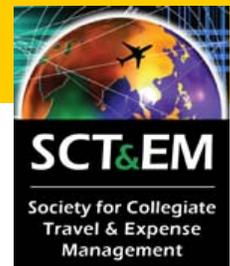
8:00-8:45AM BREAKFAST

8:45-10:30AM WELCOME AND GENERAL SESSION A

Forecasting the Economic Landscape of Higher Education, the Travel Industry, and the World in General: What Conditions to Expect Over the Next 18 Months

Christopher Thornberg, Ph.D., Partner | Beacon Economics

Dr. Christopher Thornberg will open the SCTEM conference with an analysis of recent economic activities, and a forecast of the economic landscape in higher education, the travel industry, and the world in general. Dr. Thornberg, formerly a faculty member at UCLA and now a partner in his own firm, includes both quantitative data and entertaining stories in his presentation, transforming a standard economics lecture into a practical and enjoyable learning experience. Through Dr. Thornberg, SCTEM attendees will gain a deeper understanding of the economic conditions that have challenged our institutions, the travel suppliers with whom we negotiate, and the world in which we live. Audience members will also leave with historical evidence that bad economic cycles have, thankfully, come to an end.



MONDAY 9.14.09 - Continued

10:30-11:00AM TRADE SHOW AND BREAK SPONSORED BY: ANTHONY TRAVEL

11:00-12:15PM EDUCATIONAL SESSION BLOCK 1

1A Supporting Those in Charge: What Executives Need from Staff during Challenging Times, and How to Gain Executive Support for New Cost-Saving Initiatives during this Downturn

*David Brower, Comptroller and Assistant Vice President | Michigan State University
Susan K. Abeles, Associate Vice Chancellor / Controller | University of California, Los Angeles*

Given the state of the economy, those in executive management are expending significant effort strategizing with their presidents/chancellors, campus leaders, stakeholders, peers, economists, bankers, and other trusted advisors on issues such as revenue generation, cost savings, program changes, etc. In this session, SCTEM participants will learn firsthand from a panel of senior executives about the challenges their institutions have been facing, and what role those in travel, purchasing, accounts payable, and disbursements should play to help reduce costs and steward institutional funds. During this session, SCTEM attendees will also have the opportunity to learn what initiatives and tactics capture an executive's attention, and why tough times could be an era of opportunity.

1B Deciphering Codes and Terms: How to Reduce Costs and Improve Compliance by Properly Interpreting Itineraries and Tickets

Marguerite Gustkey, Travel Manager | Penn State University

For those processing travel reimbursements, a myriad of travel industry codes and terms make it difficult to determine what was actually purchased. Example questions faced by disbursement processors include: Was the first-class seat in 1A obtained through a frequent flier mile redemption? Was the international ticket issued in compliance with the Fly America Act's new Open Skies agreement? Is the price printed on the itinerary the amount actually paid? In addition to presenting tips and resources for decoding travel documents to reduce costs and improve compliance, the facilitator will also share some examples of reimbursement policies that surfaced over the past year to address ancillary fees charged by airlines, such as economy plus seats, pillows and blankets, advance boarding privileges, and extra luggage.

1C Transporting with Safety in Mind: How The University of Texas System Involved a Large Group of Safety Experts and Evolved A Safe Travel Management Program

*Nancy Sutherland, Travel Program Director | The University of Texas System
Shirley Mason, Vice President | Aviation Research Group, U.S.*

At two previous SCTEM conferences (2002 and 2005), administrators from The University of Texas System described the institution's ongoing effort to consolidate and improve its travel management program in support of UT's fifteen (15) institutions and System Administration. UT's most recent initiative involved numerous UT departments (risk management, procurement, legal counsel, and travel) and evolved a safe travel management program. To facilitate UT's efforts, System Administration worked in tandem with an aviation consulting company, Aviation Research Group, U.S. The consultants assisted with the development of System-wide guidelines and contract templates for group and



VIP charter services, medical and research transport, and non-charter team travel. The analysis a old and the acquisition of new UT System aircraft. Universities wanting to mitigate travel risk will this extensive and important initiative.

MONDAY 9.14.09 - Continued

12:15-1:15PM LUNCH

1:15-2:30PM KEYNOTE / GENERAL SESSION B

Expanding (*Rapidly!*) into Business Traveler Territory: How Southwest Airlines is demonstrating its LUV for the Business Traveler, Especially Faculty and Staff on Tight Budgets

TBD | Southwest Airlines

In his keynote address to SCTEM, XYZ will talk about Southwest Airline's rapidly evolving commitment to the business traveler, and showcase some of its latest business-traveler services, such as code sharing arrangements with international carriers, Business Select, Fly-By-Lanes, A-1 List, and on-board WiFi. For added fun, XYZ will flash some of Southwest's admittedly-daring advertisements, and explain how the airline uses these ads to distinguish itself from the competition. Of course, Southwest is not immune from the current economic climate; XYZ will talk about i) how the airline is tackling the toughest economy in its 30-year young history, ii) how it is using these times to enter desirable markets (such as Boston Logan International, a gateway for some major universities), and why it is tinkering in the higher education space.

2:30-3:00PM TRADE SHOW AND BREAK SPONSORED BY: NBTA (NATIONAL ASSOCIATION OF BUSINESS TRAVEL ASSOCIATION)

3:00-4:15PM EDUCATIONAL SESSION BLOCK 2

2A Traveling Securely: How to Mitigate the Risks Associated with International Travel

Julie Friend, Travel Security Analyst | Michigan State University

In this session, a travel security expert will explain why heightened concerns over traveler security have complicated the administration of international travel programs. The speaker will begin her session by emphasizing the importance of identifying whether an international program is (or is not) sponsored by the university, as this determines the extent to which an institution is responsible for having in place certain risk-mitigation practices. The expert will also articulate how an institution can i) offer safety training to its study abroad program leaders, ii) use campus-wide database systems to register and monitor travel activities, iii) create and monitor a crisis communication plan, and ii) prepare travelers for new federal laws that restrict the transport of controlled equipment and material.

2B Revving Up: Why Knowing the Latest in the Rental Car Business will Mitigate Risk, Cut Costs, and Add Value to Your Travel Program

John O'Malley, Director, Strategic Accounts | National Rental Car

Whether your institution has a long-term rental car contract or needs to establish its first one, you'll want to learn what's happening in the rental car world. Like other travel industry sectors, the rental car industry is going green. In this session, the speaker will explain the challenges and rewards associated with maintaining a sustainable fleet (such as



how hard it is to acquire high-demand hybrid vehicles!). The speaker will also address i) insurance mitigate institutional risk; ii) the cost-saving benefits of consolidating an institution's total vehicle provider (van pool, zip cars, trucks, rental cars, etc.); iii) the impact of a shrinking and troubled auto industry; iv) the effects of a wave of rental car mergers and acquisitions.

MONDAY 9.14.09 - Continued

2C Protecting Institutional Assets during Tough Times: How to Enhance Expense-Audit Strategies

Howard Levy, Associate Senior Vice President, Audit Services | University of Southern California

Rachel Baeza, Manager of Payment Audits | University of Southern California

Auditing institutional expenditures helps ensure compliance with policies, and improves the chances of detecting abuses. Therefore, institutions should staff an expense-audit department in order to ensure the protection of institutional assets. In this session, the speakers will emphasize that the need for audit resources peaks during an economic downturn, when the misappropriation of university funds may be all the more tempting. They will also discuss important training programs, policy clauses, and employee agreements that an institution should have in place to mitigate expense misappropriation, and to facilitate the taking of any necessary disciplinary action. The session will conclude with an example of the types of spending patterns that warrant further scrutiny by auditors, and tactics on how an auditor can reasonably sift through thousands of transactions to produce a targeted review.

4:15-5:00 GENERAL SESSION C

Getting an Accurate Picture: How a Revitalized SCTEM Benchmarking Study will Deliver the Latest Facts and Figures About The Effects of the Economy on University Travel-Related Expenditures

Ian Thomas, Partner | Academic Travel Consulting

Clare Hansen-Shinnerl, Assistant Vice President- Business Services | University of Southern California

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 implemented new travel policies to reduce spending in response to the economic downturn. Among other questions, the study will answer what percentage of institutions have put a freeze on travel, required additional levels of approval prior to travel, or have continued to travel status quo. While SCTEM conducts a benchmarking survey annually, this year's study promises to provide particularly substantive data that attendees will find relevant and timely.

7:00-10:00PM RECEPTION SPONSORED BY: AMERICAN EXPRESS CORPORATE SERVICES

TUESDAY 9.15.09

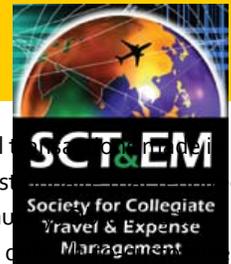
8:00-9:00AM BREAKFAST

9:00-10:15AM EDUCATIONAL SESSION BLOCK 3

3A Responding to New IRS Reporting Requirements: Why Travel and Expense Administrators are Playing a Critical Role in the Gathering of Data for their Institutions

Gwen Spencer, Esq., Partner | Exempt Organizations Tax Services, PricewaterhouseCoopers

The IRS has issued several new requirements for academic institutions to report detailed travel and



expenditure data. For example, institutions must now report on their tax returns certain financial support of specific overseas activities. Additionally, in 2008, the IRS issued a comprehensive questionnaire to approximately 400 schools to report specific expenses for an IRS study on the tax-exempt community. Collecting the necessary data has been challenging for many institutions, given decentralized data sources and outdated information systems. In this session, expert tax attorney Gwen Spencer will a) explain the genesis and purpose of these new IRS reporting requirements, b) describe what institutions have been doing to collect the data, and c) anticipate what additional travel and expense reporting requirements the IRS may issue in the forthcoming years.

TUESDAY 9.15.09 - Continued

3B Eyeing the Functionality of Indiana University's Travel/Expense Reporting System: Why Your Institution May Be Able to Benefit When IU's System Migrates to the Kualii Financial System

Moderator: John Harner, Director of Travel Management Services | Indiana University

*Anne Bartlett, Travel Analyst | Indiana University
Dave Crabtree, Travel Analyst | Indiana University*

Indiana University's newly-released travel/expense reporting system is a J2EE Web application, and harnesses the same tools and frameworks as the Kualii Financial System. (The Kualii Financial System is a suite of open-source software modules designed by the higher education community for deployment across academia: www.kualii.org). Attendees will witness a demo that shows how IU's system processes travel authorizations, pre-payments, and reimbursements for faculty, staff and students, and routes approvals and documents using the Kualii Enterprise Workflow engine. The presenters will also discuss how ghost credit card reconciliation is applied within the system for direct-billed air, hotels, and car rentals. Most importantly, the presenters will solicit ideas from the audience about how IU's travel/expense reporting system should be modified to meet the requirements of the broader academic community in preparation for the system's migration to Kualii.

3C Launching a Responsible Travel Management Program within a Sustainability Framework: How the University of British Columbia is Leading the Way

*Larry Berglund, Director of Supply Management | University of British Columbia
Connie Fabro, Travel Manager | University of British Columbia*

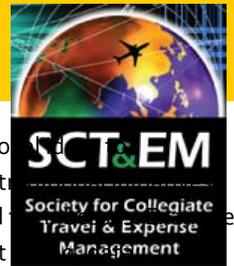
The University of British Columbia is known throughout the higher education community for having some of the most progressive sustainable business practices. During this interactive session, representatives from UBC will discuss their experiences launching a responsible travel management program within a sustainability framework. Among other initiatives, those responsible for UBC's travel management program have worked closely with UBC's Sustainability Office to i) calculate the carbon emissions produced by UBC's business air travel, ii) establish a program whereby UBC departments can pay a carbon offset fee, and iii) integrate sustainability criteria as part of the university's corporate hotel bid. The passionate presentation will look at how UBC sets priorities, takes pragmatic steps to achieve positive outcomes, and establishes performance metrics. UBC will share its role as a broker of deals, advocate for compliance, and leader of change on the subject of sustainability.

10:15-10:45PM TRADESHOW AND BREAK

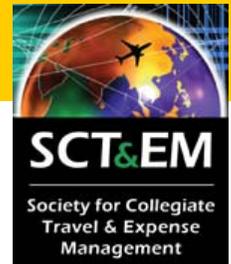
10:45-12:00PM EDUCATIONAL SESSION BLOCK 4

4A Spicing up a Mature Program: How to Add Even More Value to an Already Well-Established Travel Management Program

*Belinda Borden, Travel Manager | University of California, Los Angeles
Robert J. Zartarian, Director, Travel Services | Yale University*



Those who administer well-established travel management programs are always searching for new ways to supplement their suite of services. During this panel, three travel administrators will discuss less than obvious initiatives they've recently implemented that have been appreciated by travelers, travel coordinators...and travel managers. Initiatives include: charter bus services, airport shuttles and parking, clear cards, local hotel direct management, and several other surprises. Even savvy administrators will benefit from the main emphasis of this session: being nimble and resourceful is critical to sustaining a best-practice travel management program.



TUESDAY 9.15.09 - CONTINUE

4B Making Sense of the Turmoil: What Institutions with Corporate Card Programs Should Expect from the Turbulent Banking World

Moderator: Jerry Allison, Publisher | Business Travel Executive

Gonca Latif-Schmitt, Managing Director, Global Transaction Services | Citibank, NYC

Aaron Snyder, VP Western United States | American Express

Tom Horgan, VP Channel Sales/Public Sector | US Bank

As banks continue to sift through unprecedented levels of turmoil, those administrators who oversee corporate card contracts/ programs wonder how their institutions will be impacted. In this session, a panel of leaders from within the corporate card industry describe the ups and downs (with an emphasis on the downs!) the banking industry has experienced over the past year, and how these challenges may affect corporate card programs in higher education. For example, experts will state their opinions on i) whether client rebates are sustainable; ii) what service-model changes clients should expect (in source, outsource, additional credit checks, etc.); iii) what further consolidations among banks are in the forecast; and iv) what client profile puts an institution in an advantageous negotiating position (fast DSO, low credit and fraud losses, etc.).

4C Harnessing the Bargaining Power of E&I Cooperative Purchasing: How Big and Small Institutions can use this Resource to Reduce Costs and Improve Services

Gary Wilson, VP Educational Markets | E&I Cooperative

Vince Patriarco, Exec VP Strategic Sourcing and Business Development | E&I Cooperative

Many academic institutions are members of Educational and Institutional Cooperative Purchasing (E&I) through their purchasing departments' membership in the National Association of Education Procurement (NAEP). Since 1934, E&I has been negotiating reduced-rate and value-added contracts by leveraging the collective spend of their member institutions. Several attractive E&I contracts are now travel and expense-management related. In this workshop, E&I executives will highlight the benefits of these contracts. Most importantly, the E&I speakers will engage attendees in discussions on how this coop can best be a resource for SCTEM in future supplier negotiations.

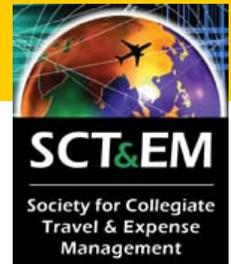
12:00-1:00PM LUNCH

1:00-2:15PM EDUCATIONAL SESSION BLOCK 5

5A Administering Relocation Expenses: How to Balance Tax Reporting Requirements with Improved Services for Newly Relocated Employees

Clare Hansen-Shinnerl, Assistant Vice President- Business Services | University of Southern California

In many cases, an expense report or invoice for relocation looks no different than support documentation for a business trip. After all, receipts or invoices associated with relocation include airline tickets, hotel accommodations, rental car reservations, and so forth. In this session, the speaker will explain, a) what relocation expenses are taxable according to the IRS (for example, more than one roundtrip airline ticket), b) what tools academic institutions can use to enhance their ability to comply with IRS reporting requirements, c) how new employees can receive accurate information about the impact of relocating on their taxes (i.e., avoid surprises), and d) how to improve relocation services to newly hired faculty and staff.



TUESDAY 9.15.09 - CONTINUE

5B Controlling Costs While Maintaining a Mandatory Athletic Team Travel Schedule: What to Negotiate in a Buyer's Market that Favors your Team's Budget

John Anthony, President | Anthony Travel

Mike Dowling, Director, Event Management | UCLA Intercollegiate Athletics

Kevin McGuire, Manager, Intercollegiate Travel UT Austin | President of the National Business Travel Association

Athletic teams at colleges and universities need to travel to their scheduled meets, even when budgets are scaled back. In this session, athletic-travel veterans will provide specific examples of cost-cutting options available to those who coordinate team travel, and will emphasize that the biggest opportunities exist for those who are most flexible. Tips shared in this session will go beyond explaining what to negotiate in a buyer's market, and will include information about billing/payment options that can further lower rates. Many of the techniques shared in this session also apply to group movements outside of athletics, so a range of attendees will benefit from the experiences of those who have mastered the complexities associated with getting groups from point A to point Z, and through all the steps in between!

2:15-2:45PM TRADESHOW AND BREAK

2:45-4:45 PM GENERAL SESSION 6

Transforming Thoughts into Actions: Why Knowing 'Who's Who in the Zoo' Will Help SCTEM Attendees Gain Support for New Ideas

Paula Mulford, Consulting Associate | Leadership Research Institute

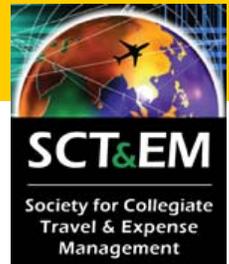
Often we leave a conference with a flurry of great ideas but depart without any practical training on how to deploy the newly acquired knowledge. In this session, attendees will benefit from the expertise of Paula Mulford, a leadership consultant whose engaging style has helped several university administrative units transform ideas into practice. Paula will demonstrate that one critical factor to gaining approval for a new idea is to understand "Who's Who in the Zoo." Once you know how different individuals respond to information, you'll have more success gaining support for your agenda. Paula will also share simple tactics that will help transform your administrative unit into a customer service Mecca, a place able to balance policy, controls, and 'double bagger' service! Paula's sessions are extremely popular and highly-rated. You will not want to miss this entertaining, learning experience!

2:45-4:45 PM THANK YOU AND WRAP UP

At this brief wrap-up, SCTEM will reveal its 2010 destination. As a thank you for attending, two sets of two round trip airline tickets, courtesy of United Airlines, will be raffled off by the SCTEM board. Two lucky SCTEM attendees will be able to take a companion and travel anywhere in the continental U.S. serviced by United Airlines!

7:00-10:00PM MARINA DEL REY DINING EXTRAVAGANZA

Marina del Rey is home to many different restaurants, and on this evening you will have a choice to dine at your favorite! We will circulate a list of seven popular restaurants that are near property, and you can sign-up where you prefer to dine once you arrive. We will include a range of restaurants to accommodate all tastes and budgets. Two SCTEM board members will escort each group to their respective restaurant, and from here the fun will begin. Attendees are "on their own" for the cost of this meal.



WEDNESDAY 9.16.09

9:00-1:00PM VISIT UCLA'S TRAVEL CENTER AND TOUR THE BEAUTIFUL WESTWOOD CAMPUS!
SPONSOR OF SHUTTLE SERVICE: THE PARKING SPOT

Belinda Borden, Travel Services Manager | University of California, Los Angeles

One of the most impressive travel management programs in higher education is the one in place at UCLA. Join UCLA's Travel Services Manager on a tour of the university's Corporate Travel Department (CTD), an operation that services the UCLA campus and the entire UC System as part of the UC's Connexus Travel Program. After discussions with the UCLA travel management staff, join SCTEM adventurers for a campus tour. Comfortable walking shoes are essential!

9:00 am: Parking Spot Shuttle leaves hotel
1:00 pm: Parking Spot Shuttle returns to hotel
Lunch: On your own on campus or in Westwood

GENERAL INFORMATION

REGISTRATION

Registration is \$525 per person and includes admission to all sessions, admission to the tradeshow, and the following meals: Sunday reception, Monday breakfast, lunch, and reception, and Tuesday breakfast and lunch. Diner on Tuesday evening is on your own.

Registration is on line and payment is via credit card: www.usc.edu/sctem/registration. Institutions without credit cards should contact the University of Southern California for a form registration, and instructions for check payments: sctem@usc.edu.

CANCELLATION POLICY

Requests to cancel SCTEM registration must be made in writing and sent via email to: sctem@usc.edu. A \$50 administrative fee will be applied to all refunds. Not refund will be made for cancellations received after August 1, 2009. Substitutions may be made at any time.

LODGING

Hotel rooms are available at the Marina del Rey Marriott at the special conference rate of \$179 per night single/double (plus taxes). Participants should make reservations by calling (800) 228-9290 and referencing the SCTEM group name or online at www.marriott.com/laxmb using group code: **sclscla**. The special group rate will be extended to SCTEM attendees two days before and after the conference dates. The cutoff date for making reservations at the special rate is Friday, August 21, 2009. Reservations after this date will be accepted by the Marriott on a space available basis, only. **Hotel availability is limited, so attendees should make their reservations early!**

GROUND TRANSPORTATION

- **Taxi Service** -- The Marina del Rey Marriott is conveniently located only 10 minutes from LAX. Taxi service is efficient, and will cost approximately \$15 (including tip). Note that use of a shuttle service, such as PrimeTime or Supershuttle, is not less expensive than a taxi given the short distance.
- **Rental Cars** -- Attendees wanting to explore the Los Angeles area in tandem with the conference can take advantage of a special SCTEM rental car rate offered by National Rental Car. For reservations, contact your travel agency or call National Rental Car at 1800-CAR-Rent or visit: www.nationalcar.com. To obtain the SCTEM rate, use contract ID#: 5008970.

HOTEL AND NEAR-HOTEL PARKING

- **Hotel Parking** – Valet parking at the Marina del Rey Marriott is available at a rate of \$13 per day.
- **Outdoor Parking** – As an alternative to parking at the hotel, attendees can park in an outdoor lot located directly across the street from the Marina del Rey Marriott. All day parking costs \$6. Overnight parking is permissible; however, you must call and register your vehicle if you intend to park your vehicle overnight. Phone: 310.305.9534



GENERAL INFORMATION - Continued

RECOMMENDED DRESS

"Business casual" dress is appropriate attire for all events at SCTEM. Note that each participant is asked to wear attire that sports their school or company colors/logo to the Opening Night Reception.

Although weather in Los Angeles during the month of September is typically warm, the hotel is located along the Marina and near the Pacific Ocean. Sweaters /sweatshirt may be needed.

SAMPLES FROM SCHOOLS

We encourage you to share pamphlets, policy documents, and promotional items that your institution has created to communicate new policies and procedures or to promote travel and/or expense management programs. Samples can be delivered to the registration booth upon arriving in Los Angeles, and will be made available to SCTEM participants throughout the conference.

TRADESHOW – ATTENDEE INFORMATION

A vendor tradeshow that features the most popular academic suppliers will take place on Monday and Tuesday during extended morning and afternoon breaks. This is an ideal opportunity to view on-line booking and expense report demos, discuss contract opportunities, and network. The vendor trade show attracts travel management companies, airlines, rental car companies, expense reporting applications, on-line booking applications, airport parking providers, hotels, consultants, and much, much more!

TRADESHOW – EXHIBITOR INFORMATION

Participating in the SCTEM Tradeshow is an ideal opportunity for suppliers to network with collegiate decision makers, and to recommend solutions that lead to lower costs, enhanced services, and streamlined efficiencies within the academic enterprise. The Tradeshow will be open during extended morning and afternoon breaks on Monday and Tuesday. Costs for a Tradeshow booth is \$395 (plus fees to register for the conference). To register, go to: www.usc.edu/sctem/tradeshow.

Questions about participating in the Tradeshow can be addressed to SCTEM Board Member: John O'Malley, Director of Strategic Accounts, National Car Rental: omalleyj@nationalcar.com.

INFORMATION / QUESTIONS ABOUT SCTEM'S 2009 CONFERENCE & TRADESHOW

Information about SCTEM'S 2009 Conference & Tradeshow is posted on the Society's website: www.usc.edu/sctem. Questions can be addressed to the Society's Executive Director:

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