

Workplace Safety Insurance Board

Value for Money Audit of
the Travel Office

Final Report

December 2020

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Executive Summary

Audit conclusion

Based on the results of our work we found the Travel Office (“TO”) program has demonstrated value-for-money within the domains of the areas assessed, particularly as it relates to service quality, effectiveness and the support of the WSIB’s strategic objectives. There are strong governance and continuous improvement practices in place and the WSIB has effectively self-identified areas of improvement through customer feedback and analysis of performance data to enable continued support of RTW and recovery.

Observations and recommendations have been raised in this report to improve efficiency and economy of the Travel Office program in the following assessment areas:

- ▶ Service offerings and financial management
- ▶ Service delivery and technology support
- ▶ Performance management and data analytics
- ▶ Contract and service provider management

Summary

Governance

Overall, the WSIB has shown effective governance over the TO’s operations and has aligned the TO with the organization-wide strategy through restructuring, modernization initiatives and employee training:

- ▶ The organizational structure, resources and capabilities of the TO are adequate to support service delivery and meet customer needs.
- ▶ Governing policies and procedures are written clearly and accessible to employees and management for reference.
- ▶ TO employees’ roles and responsibilities as they pertain to travel are understood and in line with management’s expectations.
- ▶ Comparison against other Workers’ Compensation Boards (“WCBs”) showed that the WSIB has a higher level of end-to-end control over the travel management process.

Service offerings and financial management

The TO’s service offerings are sufficient and appropriate to meet customers’ needs. However, there is an opportunity to improve financial management over incurred expenses:

- ▶ Service offerings are reviewed through customer surveys, call and work quality reviews, a recent ethnographic study and vendor business reviews to ensure customers’ travel needs are addressed effectively while enabling compliance with the Workplace Safety and Insurance Act (“the Act”) and alignment with strategic objectives.

- ▶ Increase in the availability of localized health assessments and care for injured workers led to a significant increase in annual taxi spend at over 30% YoY from 2017 to 2019.
- ▶ The TO performs effective financial management over its service offerings primarily through the specification of preferred rates with its travel suppliers and ensuring a high rate of preferred supplier use, thereby maximizing cost savings.
- ▶ The TO has negotiated rebates of 10-20% with its taxi vendors, which is unique when compared to other WCBs and has helped lower the financial impact of the increasing taxi activity.
- ▶ The TO's Travel Management Company ("TMC") supplies periodic reporting packages that include information on air and hotel spend, missed savings, trip and traveler details. There is currently no mechanism at the Travel Office to formally monitor, report and investigate opportunities for additional cost savings stemming from review of reporting packages.

Service delivery and technology support

User-friendly, and effective service delivery to the TO's customers is enabled through adequate technology support and established processes. There are opportunities to improve the efficiency of service delivery to workers:

- ▶ Processes and workflows between case workers and the TO have been implemented to ensure high-quality and timely service delivery to the WSIB's customers.
- ▶ Travel requests for injured workers are managed via the WSIB's claims management systems, Accounts and Claims Enterprise System ("ACES") and reservations are made through different software and web platforms, depending on the vendor.
- ▶ To further improve its technology support for travel reservations, the TO is implementing a software solution to modernize and simplify air and hotel booking activities for its employees.
- ▶ Service delivery management and technology support have enabled achievement of high customer satisfaction at 97%, which was shown in customer surveys.
- ▶ Customer surveys also highlighted a key concern among respondents around reducing wait times for phone service. There is an opportunity to improve the efficient use of resources and overall service delivery by incorporating a streamlined approach to manage the increasing number of taxi bookings.
- ▶ Key metrics with respect to call service, Average Speed of Answer and Live Answer Rate, were not met in 2019, highlighting an area of improvement.

Performance management and data analytics

Performance of the TO is monitored and reported to enable continuous improvement and facilitate decision making:

- ▶ Service Level Agreements ("SLA") have been defined, communicated and monitored to assess the performance of the Travel Specialists' call and booking activities. The SLAs are tracked and reported to TO leadership and are rolled up to a formal dashboard at the Cluster level.
- ▶ Formalizing the reporting and tracking of internal SLAs enables continuous improvement and ensures that dips in service quality are recognized and remediated in a timely manner.

- ▶ The TO's call service performance monitoring is on par with leading practice.

Contract and service provider management

Contracts with external service providers are established to deliver expected services. However, certain contracts can be consolidated and oversight activities during the life of the contract can be bolstered to ascertain achievement of SLAs and delivery of high-quality service:

- ▶ The process to procure external services is clearly established at the WSIB and understood by the TO.
- ▶ During procurement, SLAs are defined in external contracts around the provision of timely, high-quality service and timely reporting to the TO.
- ▶ Quarterly business reviews are held with vendors to discuss performance, highlight risks and identify opportunities for improvement.
- ▶ The outcomes of quarterly business reviews are integral to evaluating and improving vendor performance over the life of the contract, ultimately generating value for workers and the WSIB staff. However, the TO does not have a holistic view into vendor performance and SLA-achievement to enable effective vendor business reviews.
- ▶ There is an opportunity to better leverage the rapid increase in taxi activity to consolidate the number of taxi providers to ease contract management efforts and drive more competitive rates.

The value for money audit identified five observations with associated recommendations, summarized below.

#	Observation	Recommendation
1	<p>There is no formal mechanism to monitor, report, and investigate opportunities for higher cost savings stemming from TMC reporting.</p> <p>Rating: Moderate</p>	<p>As the owner of the TMC reports, the TO should formalize the monitoring of TMC reporting by documenting missed opportunities for cost savings and following up with Travel Specialists or operations to identify root cause.</p>
2	<p>A significant and increasing amount of Travel Specialist effort is spent on taxi pre-authorizations in comparison to other services within the Travel Office. Adopting a streamlined approach to manage the increasing number of taxi bookings presents an opportunity to improve the efficient use of resources and overall service delivery.</p> <p>Rating: High</p>	<p>The WSIB should investigate opportunities to streamline the taxi pre- authorization and booking process and analyze the impact of taxi pre- authorization workload on Travel Office headcount and certification requirements. Potential solutions could include:</p> <ul style="list-style-type: none"> ▶ Implementation of a software solution ▶ The incorporation of a km-threshold to determine when taxi bookings will need TO involvement ▶ Specifying that vendors implement a system to simplify taxi pre-authorization in the next round of procurement
3	<p>Review of performance data showed that average speed of answer and live answer rate for the TO consistently fell short of target in 2019.</p> <p>Rating: High</p>	<p>The WSIB should explore opportunities and formalize initiatives to improve SLA-achievement for TO call-related metrics. Efforts to improve efficiency, particularly as noted in recommendation 2 related to the taxi booking process, will also have the associated benefit of increasing Travel Specialists' call availability and improving these metrics.</p>
4	<p>A holistic approach to monitor vendor performance, SLA-achievement and realized benefits through the life of the contract is not defined.</p> <p>Rating: High</p>	<p>The WSIB should bolster documentation around service provider performance monitoring and establish a formal feedback loop with service providers. Methods to consolidate and simplify performance monitoring, such as the development of a reporting dashboard tracking performance metrics such as SLA achievement, benefits realized to-date, and customer service complaints should be considered.</p>
5	<p>There is an opportunity to better leverage the rapid increase in taxi spend to consolidate the number of taxi providers to ease contract management efforts and drive more competitive rates.</p> <p>Rating: Low</p>	<p>The WSIB should evaluate opportunities to consolidate the number of taxi vendors and drive more competitive rates where possible.</p>

Introduction

Overview

The Workplace Safety and Insurance Board is an independent trust agency that administers compensation and no-fault insurance for Ontario workplaces. The WSIB is committed to delivering what matters to the workers and employers of Ontario: fair benefits at a fair price and fast, accessible service. The WSIB provides wage-loss benefits, medical coverage and help getting back to work – the best possible outcome following a workplace injury or illness. The level of support provided by the WSIB has a significant impact on hundreds of thousands of Ontario workers, their families and on the overall productivity of the province.

The Workplace Safety and Insurance Act (“the Act”) stipulates that a worker who sustains an injury is entitled to such health care as may be necessary, appropriate and sufficient as a result of the injury. Section 32 of the Act specifies that healthcare benefits the WSIB provides include extraordinary transportation costs to obtain health care and that the WSIB may arrange for the worker’s health care or may approve arrangements for his or her health care. The Act also states that the WSIB shall determine all questions concerning the necessity, appropriateness and sufficiency of health care that may be provided to a worker.

At the WSIB, the Travel Office within the Operations and Service Excellence Cluster is responsible for the day-to-day administration of customer and WSIB employee travel and accommodations. The TO was created in 2002 to facilitate faster recovery and return-to-work (“RTW”) for injured workers. This was done by separating the management of travel bookings from case workers and having the activities performed by roles with specific travel management knowledge and experience. It is the customer-facing contact centre that provides transportation (i.e. taxi, train, bus and airline) and accommodation booking services, which are offered for WSIB core services.

Approach and timelines

Ernst and Young LLP (“EY”) was engaged to prepare and deliver an evidence-based, independent assessment relating to the economy, efficiency and effectiveness of services delivered to Ontario workers by the TO. The identified assessment areas are as follows:

- ▶ Governance
- ▶ Service offerings and financial management
- ▶ Service delivery and technology support
- ▶ Performance management and data analytics
- ▶ Contract and service provider management

Planning and execution phases for the audit were completed between June and July 2020. Based on the assessment of these areas and the lines of evidence employed, EY provided recommendations to support efficient and effective administration of the TO.

EY was engaged to perform a Value-for-Money (“VFM”) audit under section 168 of the Act and provide an overall VFM conclusion. EY relied on guidance from the Canadian Audit and Accountability Foundation

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("CAAF") in planning the engagement. This report relies on a range of administrative, financial, and other data sources, none of which we have independently verified. EY has, however, exercised professional judgment and reasonableness considerations when analyzing data and reports. This report is advisory in nature and did not constitute an audit, review, examination, or other form of attestation as defined by the American Institute of Certified Public Accountants or Chartered Professional Accountants of Canada.

Methodology and scope

Methodology

This section describes the lines of evidence used to assess the audit criteria. Although distinct, the lines of evidence are mutually reinforcing, i.e. the document and file review informed the interviews, and the interviews, in turn, clarified concepts or questions that emerged out of the document review. Multiple lines of evidence were jointly employed to assess each objective. The process of integrating lines of evidence to assess criteria associated with each of the audit objectives is also described below.

Document review

The WSIB's Project Authority ("PA") provided the project team with an initial round of documents covering the various areas of assessment. Key stakeholder interviews, an initial document scan, and consultations with the PA identified additional documentation, such as sample reporting and performance and spend data, which the project team requested, and the PA promptly provided.

Stakeholder interviews

Stakeholder interviews were designed to provide quantitative and qualitative information related to economy, efficiency and effectiveness of the TO. The project team developed interview guides, including questions relevant to each stakeholder's responsibilities and conducted interviews with 17 key stakeholders drawn from the WSIB staff and management in the Operations and Service Excellence, Finance, Risk and Strategy Clusters. Information gathered through the interviews was leveraged when assessing economy, efficiency and effectiveness.

Jurisdiction scan

Workers' Compensation Boards ("WCBs") exist in all Canadian provinces to support the administration of provincial workers compensation programs. EY conducted an initial scan of jurisdictions to determine the WCBs that would be most relevant to compare with the WSIB. The determination was based on WCB responses to an initial request as well as the size of the WCB. In addition, EY referred to travel management activities at large private sector organizations for additional context.

Integration of lines of evidence

Integrating the lines of evidence requires a structured, systematic approach to ensure the evidence base adequately addresses the audit criteria. A matrix approach was used to link relevant components of each line of evidence to the audit criteria. Observations against the audit criteria were developed based on the integration of the lines of evidence.

Rating Scale

The following ratings scales are being used to prioritize opportunities and provide an overall conclusion on the economy, efficiency and effectiveness of the Travel Office.

Individual Opportunity Rating

Rating	Definition
High	The implementation of the recommendation presents significant opportunity to materially reduce cost, improve service delivery, and/or streamline procedural tasks.
Moderate	The implementation of the recommendation presents a moderate opportunity to reduce cost, improve service delivery, and/or streamline procedural tasks.
Low	The implementation of the recommendation presents a minor opportunity to reduce cost, improve service delivery, and/or streamline procedural tasks.

Scope

The objective of the VFM Audit is to assess whether the TO provides an optimal service offering and delivery to customers while enabling economy, efficiency and effectiveness. The audit period is January 1 to December 31, 2019.

As noted in the introduction, the TO was created to facilitate a short wait time to facilitate faster treatment, recovery timelines and RTW for injured workers. In drawing a conclusion on the TO's value for money it is important to identify what represents value in its context, considering the three drivers of value (economy, efficiency and effectiveness). Given the strategic objectives of the WSIB and the TO's contribution to meeting these objectives, we have defined effectiveness (i.e. meeting program objectives) as the most important component of value, followed by efficiency and then economy. While the topic of outsourcing the TO was not explicitly included in the scope or objective of the audit, it was considered in the criteria and would have been reflected in the recommendations had it been found that the TO was not providing value for money, particularly around effectiveness. The scope of this engagement and EY's procedures are outlined below:

Scope Areas	Report ref.
<p>Governance – to assess whether the TO has been designed, established, equipped and operating appropriately with the following considerations:</p> <ul style="list-style-type: none"> ▶ Objectives and operational plan are established for the TO in alignment with the Act, as well as the WSIB's strategic objectives and plan. ▶ The organizational structure, resources and capabilities of the TO are adequate to support service delivery and meet customer needs. ▶ Roles, responsibilities, accountabilities and authority levels are established, communicated and implemented appropriately. ▶ Policies and procedures are established, communicated and implemented appropriately to guide the TO's daily operations and service delivery. 	Pg. 14
<p>Service offerings and financial management – to assess whether service offerings of the TO are sufficient and appropriate with the following considerations:</p> <ul style="list-style-type: none"> ▶ Service offerings are reviewed regularly to ensure customers' travel needs are addressed effectively in compliance with the Act and the WSIB strategic objectives. ▶ Service offering and incurred expenses are appropriately budgeted, reviewed and analyzed to ensure cost effectiveness. 	Pg. 17
<p>Service delivery and technology support – to assess whether processes are established, and technologies are applied to enable user-friendly, effective and efficient service delivery, with the following considerations:</p> <ul style="list-style-type: none"> ▶ Compare current service delivery channels and approach including technology support against leading practices and identify feasible improvement opportunities. Examples include opportunities to reduce 	Pg. 21

<p>manual work with automated processes and paper-based data with electronic solutions in the field.</p> <ul style="list-style-type: none"> ▶ Service delivery processes and controls are designed and implemented effectively to meet customer expectations as well as compliance requirements. ▶ Accessibility, timeliness and quality of service delivery are assessed on a regular basis to ensure target achievement. ▶ Customer feedback regarding service delivery are collected and analyzed for continuous improvement. 	
<p>Performance management and data analytics- to assess whether the performance of the TO is monitored and reported regularly to enable continuous improvement and facilitate decision making, with the following considerations:</p> <ul style="list-style-type: none"> ▶ Service level agreements (“SLA”) for customer-facing services and performance metrics are defined, communicated, monitored, evaluated and reported regularly. ▶ SLA and performance outcomes are supported with solid data analytics to ensure integrity, completeness and accuracy. ▶ Performance evaluation drives continuous improvement in service levels, customer satisfaction and cost effectiveness. ▶ Gaps and risks in performance outcomes are identified, remediated and reviewed appropriately. 	Pg. 26
<p>Contract and service provider management – to assess whether contracts and external service providers are managed appropriately to deliver expected services, with the following considerations:</p> <ul style="list-style-type: none"> ▶ End-to-end processes are established and implemented to ensure appropriate oversight throughout the lifecycle of contract and service provider management. ▶ SLAs are defined clearly and appropriately in mutually signed contracts and agreements. ▶ SLA outcomes are monitored and assessed regularly for service provider performance evaluation, and considered for contract granting and renewal. ▶ Gaps and risks in SLA outcomes are identified, remediated and reviewed appropriately. 	Pg. 30

Audit conclusion

Based on the results of our work, the Travel Office program has demonstrated value-for-money within the domains of the areas assessed, particularly as it relates to service quality, effectiveness and the support of the WSIB's strategic objectives. There are strong governance and continuous improvement practices in place and the WSIB has effectively self-identified areas of improvement through customer feedback and analysis of performance data to enable continued support of RTW and recovery.

Observations and recommendations have been raised in this report to improve efficiency and economy of the Travel Office program in 4 of 5 assessment areas:

- ▶ Service offerings and financial management
- ▶ Service delivery and technology support
- ▶ Performance management and data analytics
- ▶ Contract and service provider management

Audit discussion, observations and recommendations

1. Governance

At the WSIB, the TO sits within the Service Excellence Division of the Operations and Service Excellence Cluster, which reports to the Chief Operations and Service Excellence Officer.

The TO was created in 2002 with the purpose to facilitate a faster recovery and RTW for injured workers. This was done by separating the management of travel bookings from case workers and having the activities performed by roles with specific travel management knowledge and experience. The TO has since undertaken the management of travel bookings for WSIB employees as well.

Approval for worker travel is provided by case workers, while approval for WSIB employee travel is provided by WSIB management. The WSIB's suite of travel-related policies include guidelines to help determine the necessity and appropriateness of travel expense coverage. Internally, the policy suite is published on the WSIB's Knowledge Management ("KM") tool, which houses all policy and procedural documentation and is accessible through the WSIB's intranet that is available to all employees. The WSIB's Travel, Meal, and Hospitality Expense Policy is established in alignment with the Province of Ontario's Travel, Meal and Hospitality Expenses Directive, which sets out rules, principles, authorities, and accountabilities with respect to the reimbursement and payment of travel, meal and hospitality expenses for government employees, appointees and contractors. Policies with respect to travel for workers are created with the ultimate objective of facilitating improved recovery and RTW outcomes. They are published externally in the Operational Policy Manual ("OPM") on the WSIB's website. The policies are comprehensive and speak to the different programs under which travel expenses are covered. Transparency and ease of access to the policy suite enables the worker to inform themselves of the WSIB's travel services and benefits, thereby reducing uncertainty in their path towards recovery and RTW.

Comparison against other Canadian WCBs showed that travel expenses to facilitate RTW and recovery outcomes are covered. Each of the comparators rely on human involvement (either an internal or contracted resource) to book travel as opposed to implementing a self-serve system. WorkSafeBC and WCB Alberta deploy a similar structure to the WSIB for travel management, where they have an internal travel arrangement team that workers may contact to arrange travel. A key difference between these comparators and the WSIB is that the WSIB has completely insourced travel booking activities, whereas at WorkSafeBC, air, hotel, and rail travel booking is outsourced to an external travel agency and at WCB Alberta, complex travel arrangements (e.g. multiple modes of travel, reoccurring travel) are outsourced to an external travel agency.

Overall, while the comparators relied on external travel agencies to complete the travel booking process for air, hotel and rail reservations, the WSIB is unique in using an internal group with specialized travel management skills and knowledge to book these types of travel. This level of control end-to-end over the travel reservation process allows the WSIB to provide a full suite of services to workers and achieve high customer satisfaction. Given the relatively low proportion of these services at WSIB (less than 25%) this client satisfaction is achieved without a material impact on cost vs. an outsourced model.

Alignment with a new Strategy

In 2019, the WSIB entered the first year of its Three-Year Strategic Plan (2019-2021). The key theme of this Strategic Plan is to deliver public value to Ontarians by “reducing the disruption and devastation caused by workplace injuries and illnesses, while making Ontario a safer place to work”. The WSIB has identified four goals which would enable delivery of public value:

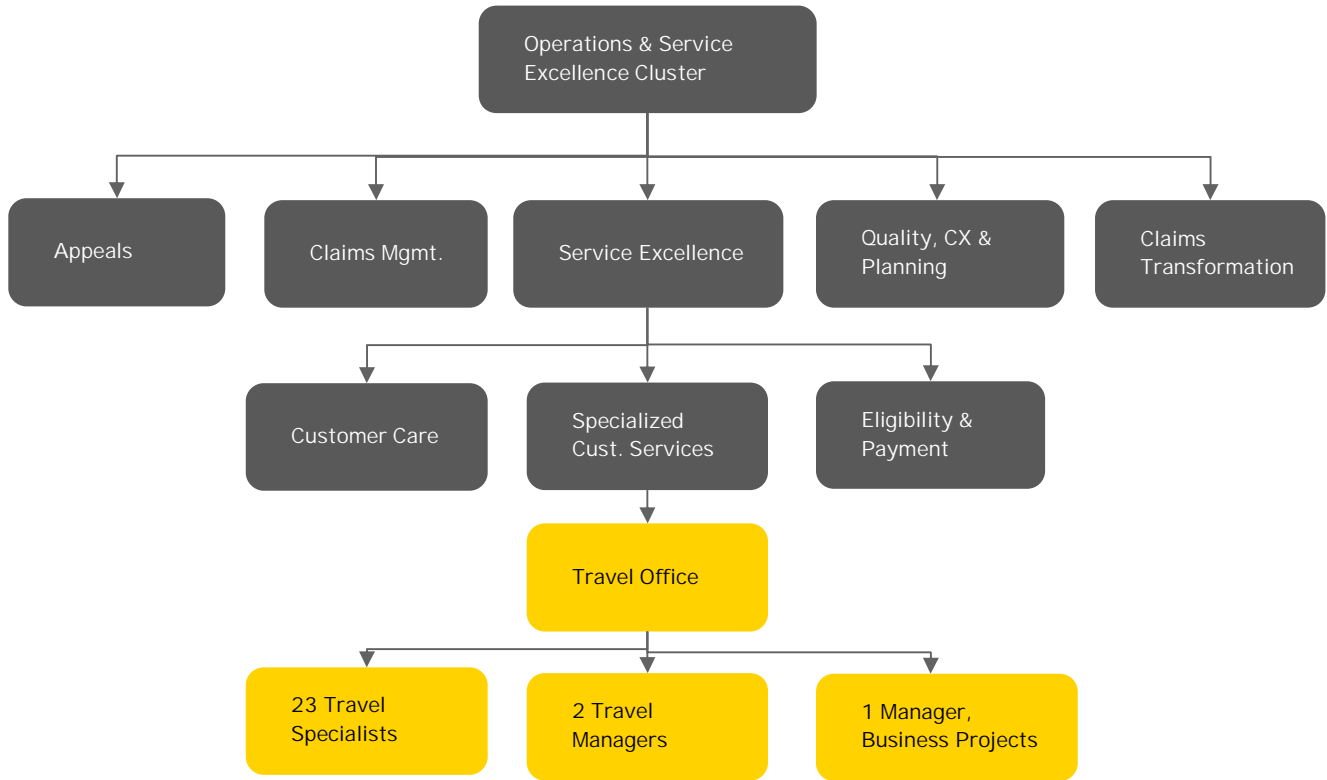
1. Make Ontario a safer place to work
2. Improve return-to-work and recovery outcomes
3. Meet customers’ needs and expectations
4. Provide services in a financially responsible and accountable way

The TO, in partnership with the WSIB’s Customer Experience and Digital Office, conducted an ethnographic study focused on identifying customer needs and opportunities for improving travel services, thereby improving recovery and RTW outcomes. Findings from this study led to the identification of inputs and requirements for the WSIB transformation projects, Core Services Modernization and Electronic Provider Services.

In the beginning of 2019, The TO was comprised of four roles in the as follows:

- ▶ Customer Service Travel Assistants (“CSTA”) responsible for responding to all inbound calls from injured persons traveling for claim related appointments, making all taxi and bus arrangements.
- ▶ Travel and Reservation Specialists (“TRS”) responsible for responding to triaged calls from CSTAs, arranging air / rail transportation and/or hotel accommodation for injured persons, authorized escorts and WSIB staff. TRS employees were required to be Travel Industry Council of Ontario (“TICO”) certified Travel Counsellors.
- ▶ Travel Managers responsible for management of day-to-day operations and monthly performance reporting.
- ▶ A Manager, Business Projects responsible for managing external contracts and service providers as well as any projects to modernize the Travel Office’s service delivery.

One of the major initiatives undertaken in Q4 2019 was the creation of a new Travel Specialist role by merging the previously existing CSTA and TRS roles. The Travel Specialist role was created in response to learning that WSIB customers found it confusing and burdensome to transfer between the two previous roles and impacted travel booking timeframes. Travel Specialists are responsible for responding to all inbound calls to the Travel Office and making all air, rail, hotel, taxi and bus arrangements for injured persons, and WSIB staff. Similar to the TRS role, all Travel Specialists are required to obtain a TICO certification. Throughout 2019, the TO reported into Customer Care, within the Service Excellence Division. In Q2 2020, the Travel Office was re-aligned to the Specialized Customer Services (“SCS”). SCS includes Health Care Benefit Processing, Drug Entitlement, Business Rules (which includes travel), and Health Care Provider Clerks. This new structure was deployed to allow seamless recovery and RTW support for workers. The below organization chart demonstrates the current alignment.



Communication and understanding of procedures

Document review and interviews found that the employee roles and responsibilities and performance expectations are clearly defined and understood across the different TO roles. Procedures for TO services are written in a cohesive manner with references to other pertinent policy or procedural documentation, which allows for the reader to form a complete understanding of the process.

The procedural documents include step by step instructions on how to book travel and use the various booking tools accessible to the Travel Specialists. Interviews with Travel Specialists highlighted that the detailed procedures are useful resources and can be accessed easily through the WSIB's KM tool.

2. Service Offerings and Financial Management

While the decision to coordinate care and RTW occurs outside of the TO, the TO supports further facilitation by ensuring seamless coordination and timely travel arrangements to help workers get to and from RTW and recovery services. Travel is an integral part of the claims process as it supports and can impact the outcome of an assessment and duration of recovery (e.g. missed appointments can prolong a worker's treatment plan). Necessary, sufficient, and appropriate travel costs are covered as part of health care and RTW plans. The various aspects of travel include meals, mileage, parking, transportation, and accommodation. Eligibility for coverage for these items is first assessed and authorized by individual case workers (including case managers, nurse consultants and RTW specialists). If it is determined that transportation or accommodation is required, the TO is responsible for booking these services. The TO's primary service offerings are hotel accommodations, air, rail, bus and taxi transportation for workers (including authorized escorts) and WSIB employees. Interviews and document review demonstrated that these service offerings are reviewed through customer surveys, call and work quality reviews, the recent ethnographic study and vendor business reviews to ensure customers' travel needs are addressed effectively while enabling compliance with the Act and alignment with strategic objectives.

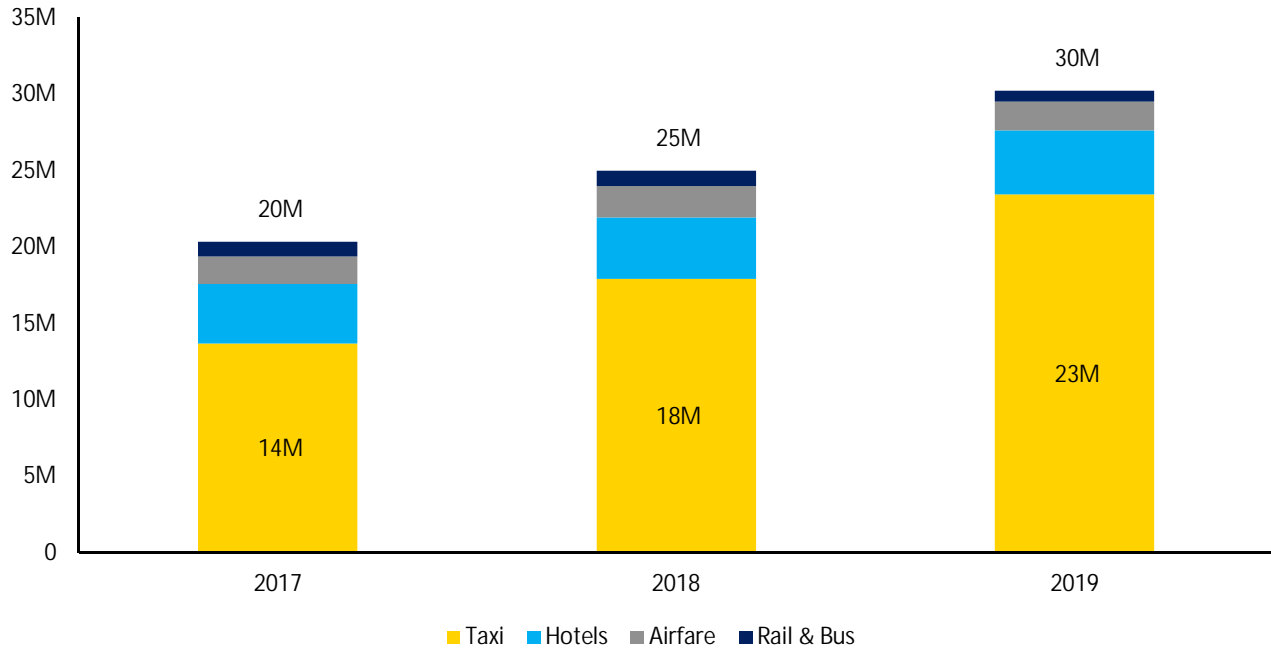
Travel services for workers are included as part of benefit costs within respective health care or RTW programs. Budgets with respect to benefits are prepared and approved by management within each program and do not require involvement from the TO. Administrative costs (2019: \$2.4M) for the TO are budgeted on an annual basis and include consideration for FTE wages and non-salary expenses (such as supplies, training and internal travel). TO management input is obtained to ensure that a holistic and accurate picture of activity levels is captured for the year.

Spend related to employee travel is governed through the Travel, Meal and Hospitality Expense Policy which clearly outlines requirements, responsibilities and accountabilities with respect to approving and incurring expenses for business purposes. WSIB employee travel in 2019 amounted to \$2M.

Service Offering Financial Management and Optimization of Cost Savings

Effective financial management over claim-related travel requires clear insight into service offering spend. Analysis of spend data for the TO's primary service offerings showed a year-over-year ("YoY") increase in total spend of over 20% from 2017 to 2019. In that same timeframe, taxi spend saw the greatest increase at over 30% YoY. Total spend for the other service offerings remained relatively constant, with the exception of rail transportation which decreased by over 40%. Interviews with TO management highlighted that this was due to an increase in the availability of localized health assessments and care for injured workers.

Travel Office Services from 2017-2019



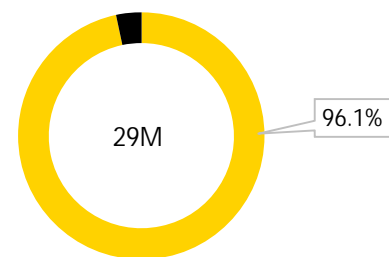
Over time, the TO has monitored travel spend and activity to help identify preferred services and respective vendors with whom to negotiate preferred rates. In 2019, the TO held a total of 30 contracts with transportation and accommodation vendors broken down as follows:

1. 20 Hotel contracts
2. 5 Taxi contracts
3. 3 Airline contracts
4. 1 Rail contract
5. 1 Travel Management Company (“TMC”)

The TO holds a contract with a Travel Management Company (“TMC”) who is responsible for the provision of the travel reservation systems used by the TO and periodic reports on travel reservations. The TMC’s travel reservation system, Sabre, covers air, hotel and car rental bookings (which are used on occasion), while Booking Builder covers rail bookings. Taxi reservations are made outside of the TMC’s system.

Interviews with Travel Specialists and management highlighted an emphasis on making use of preferred vendors when possible to maximize cost savings. This approach is incorporated into the WSIB’s travel policy as well as the TO’s travel reservation procedures to ensure that it is clearly understood and adhered to across the organization. These efforts have proven successful as an analysis of provider spend showed a high level of compliance in the use of preferred vendors.

2019 Preferred Vendor Use



■ Preferred vendor spend ■ Non-preferred vendor spend

As noted earlier, the TO's TMC supplies reporting packages on a periodic basis. TMC reporting includes information on spend, missed savings, advanced booking and trip and traveler details. Leading practice at organizations with travel programs is to review trip, traveler, and spend details on a periodic basis to identify trends and anomalies that highlight opportunities to realize higher cost savings: such as consistently booking air travel and hotel accommodations close to the travel date or frequent use of business class travel. There is currently no such mechanism at the Travel Office to formally monitor, report and investigate opportunities for additional cost savings.

Observation 1: There is no formal mechanism to monitor, report, and investigate opportunities for higher cost savings stemming from TMC reporting.

Priority: Moderate

Review of TMC reporting showed the missed savings of \$561K were reported between 2017 to 2019. Based on interviews with TO management, reporting packages supplied by the TMC are reviewed to identify potential non-compliance with travel policy or opportunities for higher cost savings. The missed savings presented in the TMC reports may have been incurred to appropriately allow for greater flexibility and trip rescheduling. However, tracking of reviews and findings is not formalized which lowers accountability and the likelihood of actioning identified instances.

Recommendation 1: As the owner of the TMC reports, the TO should formalize the monitoring of TMC reporting by documenting missed opportunities for cost savings and following up with Travel Specialists or operations to identify root cause.

Management response: The WSIB agrees with the recommendation. The WSIB will:

- Increase accountability by updating TMC reports, formalizing review and reporting of finding to ensure cost savings can be identified and actioned. This includes establishing a feedback loop to increase accountability and exploring opportunities to improve cost savings through a transaction volume discount model for future contracts.
- Continuous monitoring of TMC reports including root cause analysis for missed saving opportunities and ensure that improvement actions are developed and implemented accordingly.
- Explore how technology could reduce rates and increase cost savings through more streamlined booking system. This includes leveraging Core Services Modernization and self-serve portal functionality.

Primary owner: Vice-President, Service Excellence

Secondary owner: Sr. Vice-President, Claims Transformation & Vice-President, Corporate Business Information & Analytics

Target completion date: Q2 2021, Q4 2024 (Technology)

Verification of travel costs

A key component of financial management is verification of costs and appropriate application to respective claims or internal activities. Interviews found that the Internal Controls group at the WSIB identified a gap in

with the verification of travel costs, preventing appropriate application to related worker claims and employee travel.

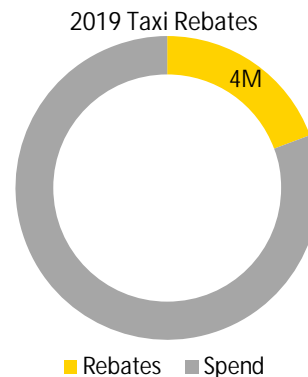
It is important to note that the amount of unverified spend was \$214K, which represents less than 1% of overall travel spend. However, if not appropriately remediated in a timely manner, the impact of the issue will increase in correlation with annual increase in spend.

Due to the identified gap in verification of spend, there is a risk of making unauthorized or duplicate payments for travel services. Internal Controls worked with the Travel Office to consolidate their findings and made recommendations to remediate the issue highlighted above.

Negotiation of higher discounts in comparison with other jurisdictions

Utilization of preferred rates is a practice seen at many organizations with a need to manage a travel program. Benchmarking against other Canadian comparators showed that Workers Compensation Boards either use travel rates that have been pre-negotiated with vendors by the province or they negotiate their own rates. The WSIB negotiates their own rates with preferred vendors for air, hotel, rail, and taxi services. However, unique from the other WCBs is the additional specification of rebates on taxi transportation.

Taxi rebates range from 10% to 20% depending on the vendor, reducing the financial impact of increase in taxi activity. Rebates are calculated by the TO as per the respective contracts and tracked to ensure that the appropriate rebate amount is applied. Data review showed that taxi rebates in 2019 amounted to \$4M.



3. Service delivery and technology support

Service Delivery

Service delivery for the TO consists of two components as follows:

- ▶ Travel-reservation and call-center activities performed by the Travel Office and,
- ▶ Provision of travel services performed by external vendors.

The TO's involvement in travel booking begins when they receive notification of an authorized travel request. For WSIB staff, travel requests are made through the use of a "Travel Request Form" which is forwarded for approval to designated approval authorities as defined by the WSIB's Travel, Meals and Hospitality Expenses Policy. Approved forms are submitted to the TO via email and a Travel Specialist will book the authorized travel.

For injured workers, travel requests are made using the Accounts and Claims Enterprise System ("ACES") which is the WSIB's claims management platform. Nurses and case workers assess the eligibility for travel based on the claimant's needs and WSIB policies. Once a nurse or case worker deems that travel for a claimant is necessary, they can specify the details of approved travel, such as mode of transportation, accommodations, and duration within ACES and submit an authorization into the TO's work queue for action. In instances where the workers' travel dates are not confirmed, the case worker can submit a general authorization for Travel and ask the worker to contact the TO once those details are available. The TO triages requests based on claimants' travel dates so that reservations are made in a timely manner. Once travel is booked, the relevant itinerary and confirmations are communicated to the traveller and saved within ACES, thereby closing the loop. This process and workflow between case workers and the TO ensures high-quality and timely service delivery.

There are also detailed procedural documents that outline how to authorize and book travel using the different tools based on travel type. The documents are readily available to Travel Specialists through the internal Knowledge Management tool. Interviews with Travel Specialists highlighted that there is a thorough understanding of all aspects of travel booking/pre-authorization. They are also aware that detailed procedural documents are available for reference. To further facilitate a smooth handoff of travel requests between case workers and the TO, the TO created a short video with step-by-step instructions for case workers to guide them through specifying travel requirements in ACES.

Call service quality is a major part of the overall value delivered to injured workers. Travel Specialists need to be conscious of the injured workers' circumstance and strive to offer solutions to meet their needs and requirements. The WSIB's Customer Quality Assurance branch helps ensure consistency of call service across all areas including the TO. The TO has formalized this approach to call service quality by including the following criteria as part of periodic performance assessments:

- ▶ Privacy verification
- ▶ Collaboration with the customer to offer solutions and alternatives
- ▶ Treating caller's circumstance with tact and empathy
- ▶ Executing the correct solution

The WSIB's approach to providing high-quality service delivery to injured workers has yielded high satisfaction with regards to travel services provided to workers as highlighted later in this section.

Technology Support

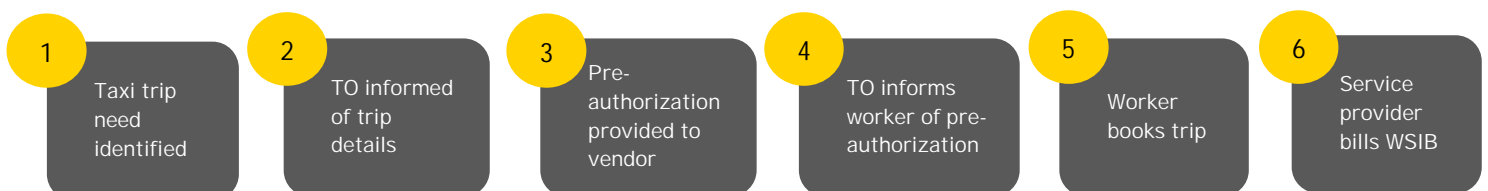
Travel service delivery is ultimately enabled through various tools and technology. While travel requests are made through ACES, Travel Specialists use different platforms to book travel based on the type of request:

- ▶ SABRE for air, hotel and car rentals
- ▶ Booking Builder for rail
- ▶ Web portals for taxis

As noted in the "Governance" section of the report, the Travel Specialist role was created in Q4 2019 by merging two previously existing roles, the Customer Service Travel Assistant and the Travel Reservation Specialists. The Customer Service Travel Assistant, only performed taxi bookings, which were straightforward activities. However, in the new role they required formal training and an official certification program to familiarize themselves with the different booking tools and to learn the complex coding requirements to book air and hotel services. Under the existing WSIB collective agreement, areas affected by such a merging of roles can have up to 6 months to ensure that staff are trained and skill to perform the activities and responsibilities of the new role. Recognizing the inherent challenges and complexity of rapidly upskilling employees, the Travel Office has explored solutions that would eliminate the need to use coding, reduce onboarding time and increase staff productivity.

A new solution, the Infinity Point/Click portal, will be implemented in 2020 to address the identified challenges. This solution was identified as a user-friendly tool that would modernize and streamline bookings by simplifying air and hotel bookings. Comprehensive change management activities to onboard their existing staff, train them to use the new tool will enable a seamless transition and maximize value provided to workers. Engaging stakeholders and service recipient's post-implementation to gather their feedback will help identify opportunities for continuous improvement. The WSIB has also developed the Core Services Modernization and Electronic Provider Services programs which are long-term transformation programs that will improve the effectiveness and efficiency of operational and business processes and benefits to the WSIB's various internal groups, including the Travel Office, as well as external customers.

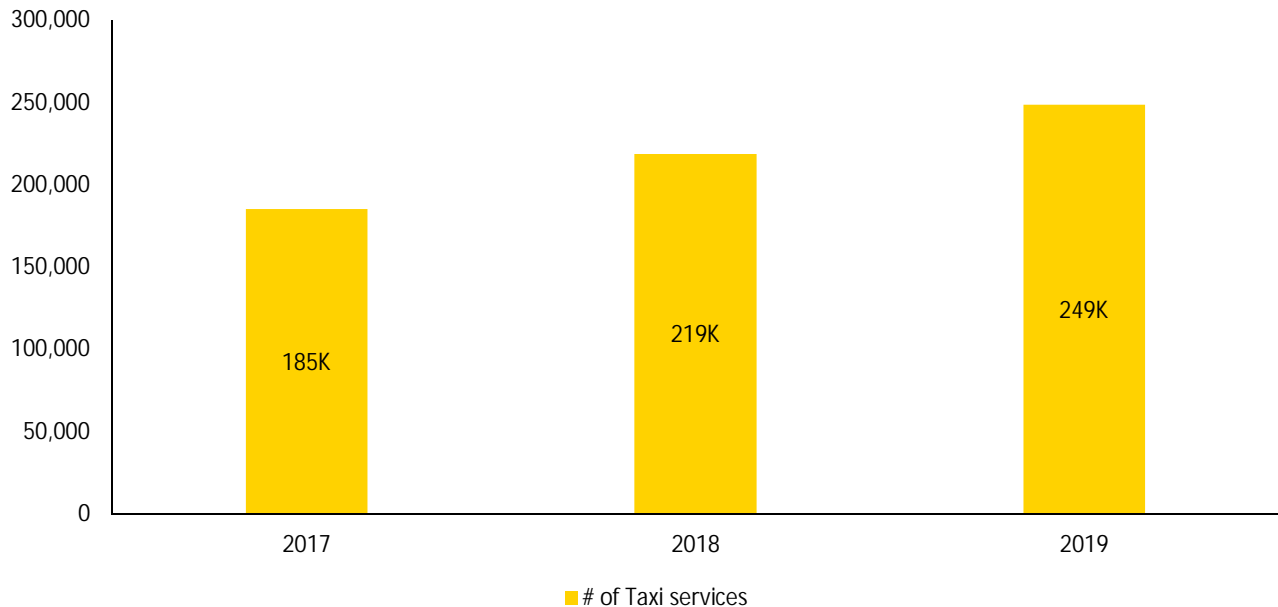
As shown earlier in this report, the TO has seen a surge in taxi activity over the last 3 years, which has in turn meant that Travel Specialists increasingly concentrate their time and efforts on taxi bookings. Currently, taxi bookings require the Travel Specialist to inform the appropriate taxi vendor that a worker has been pre-authorized for taxi services. Travel Specialists access the vendors' taxi portal to input a reference number, trip and traveller details, notifying the vendor of a pre-authorized trip that will be paid by the WSIB. The worker then contacts the vendor to schedule a pick up time. The involvement of Travel Specialists in this process is solely to notify the vendor of a pre-authorized trip. At a high-level, a typical pre-authorization looks as follows:



The TO seeks to avoid placing additional financial hardship on workers and ensure that workers do not pay for approved travel services out-of-pocket. The pre-authorization process for taxis enables this by requesting vendors to directly bill the WSIB. In addition, maintaining control over the taxi booking process ensures use of preferred vendors and optimization of cost savings.

Large organizations generally do not manage taxi bookings with the same level of rigour as the WSIB. Given their relatively low cost, taxi expenses are paid by the traveller and then reimbursed by the organization. However, interviews with the TO found that many claim-related taxi trips are high-kilometer trips used to transport workers between different municipalities, which leads to a higher trip cost, hence the focus on minimizing financial hardship on workers through direct billing. Jurisdiction scans and research showed other WCBs that manage taxi transportation, carry out similar procedures to the WSIB where the WCB notifies vendors of pre-authorized trips. At WorkSafe BC ,WCB Alberta and WCB Manitoba, taxi pre-authorization is provided to vendors. At icare in New South Wales, Australia , the case worker provides the worker with a “taxi eTicket” that can be used for payment to a taxi vendor. The worker is also required to maintain records of travel on a travel log and submit to icare.

Increase in number of Taxi services from 2017 - 2019



Observation 2: A significant and increasing amount of Travel Specialist effort is spent on taxi pre-authorizations in comparison to other services within the Travel Office. A streamlined approach to manage the increasing number of taxi bookings presents an opportunity to improve the efficient use of resources and overall service delivery.

Priority: High

As taxi activity levels continue to rise, there is a need to streamline pre-authorization procedures to enable more efficient service delivery. Although the jurisdiction scan showed similarities in WCBs' approach to taxi pre-authorizations, there is an opportunity to improve the WSIB's approach by lowering TO involvement in the process while maintaining service standards, direct billing, and appropriate financial management.

Recommendation 2: The WSIB should investigate opportunities to streamline the taxi pre- authorization and booking process and analyze the impact of taxi pre-authorization workload on Travel Office headcount and certification requirements. Potential solutions could include:

- Implementation of a software solution
- The incorporation of a km-threshold to determine when taxi bookings will need TO involvement
- Specifying that vendors implement a system to simplify taxi pre-authorization in the next round of procurement

Management response: The WSIB agrees with the recommendation. The WSIB will:

- Include a km-threshold and streamlined service delivery offering for pre-authorization procedures in the procurement business requirements for upcoming contracts
- Explore the opportunity to have a long-term solution leveraging Core Services Modernization (CSM) and a self-serve portal

Primary owner: Vice-President, Service Excellence

Secondary owner: Sr. Vice-President, Claims Transformation

Target completion date: Q4 2021, Q4 2024 (Technology)

Customer satisfaction

Obtaining feedback from service recipients is an effective way to enable continuous improvement. In 2019, the TO launched a survey in partnership with the WSIB's Corporate Business Information and Analytics ("CBIA") team to gather feedback from injured or ill workers who have received a travel-related service. The purpose of the survey was to provide the TO with an understanding of their customers' experience and inform potential service improvements. Overall, survey results were highly positive indicating that workers appreciate the service provided by the TO.

97% of survey respondents answered that service received from the TO was better than or on par with expectations (Source: 2019 Travel Office Survey (n=589)).

95% of survey respondents said that Travel Office services in assisting with claim-related travel were valuable (Source: 2019 Travel Office Survey (n=573)).

In addition, the survey also sought out suggestions for improvement. Although not all participants offered comments, there was one primary key concern cited among those who did:

71% of survey respondents who offered suggestions for improvement said that they would like to see shorter wait-times for phone service (Source: 2019 Travel Office Survey (n=178)).

The need to reduce wait time has been recognized by the TO and is monitored through the Average Speed of Answer and Live Answer Rate key performance indicators (“KPI”). Review of KPI reporting has shown that the TO has consistently fallen short of achieving their target, which will be explored in further detail in the subsequent section of the report.

The first year of survey results can serve as a benchmark against which to assess customer satisfaction, perceived value and the impact of service delivery modernization activities going forward. With 2019 being the first year of the WSIB’s new Three-Year Strategic Plan, the survey was conducted at a time when customer satisfaction was measured against the TO’s pre-transformative state. As the TO undergoes subsequent Core Service Modernization initiatives, there is an opportunity to measure the impact of changes in service delivery on overall customer satisfaction and perceived value. There is value in continuing the survey to measure the customer satisfaction impact of changes to the delivery model.

4. Performance management and data analytics

Effective performance management for the Travel Office requires a clear lens into the areas and components defined below:

- ▶ Internal staff performance management
 - Travel Specialists' call activities
 - Travel Specialists' booking activities
- ▶ External service provider performance management
 - External vendors' service delivery and quality
- ▶ Customer satisfaction with overall TO experience

Customer satisfaction was explored in the "Service delivery and technology support" section. Performance management of Travel Specialists and external service providers areas will be discussed in more detail in this section of the report.

Internal staff performance management

Interviews and document review showed that SLAs have been defined to assess the level of performance with respect to the Travel Specialists' call and booking activities. Staff performance-related SLAs are clearly understood and reinforced through regular performance reviews. The SLAs are tracked and reported to TO leadership and are rolled up to a formal KPI tracker at the Cluster level. TO leadership are accountable for SLA-achievement and provide reasoning behind any shortfalls in achievement. Formalizing the reporting and tracking of internal SLAs enables continuous improvement and ensures that dips in service quality are recognized and remediated in a timely manner.

In addition to weekly monitoring of call-related data, staff performance management activities occur more formally on a monthly basis where TO managers and the Customer Experience team conduct call quality reviews (4 in total) to evaluate customer service to against a set of pre-determined criteria, including:

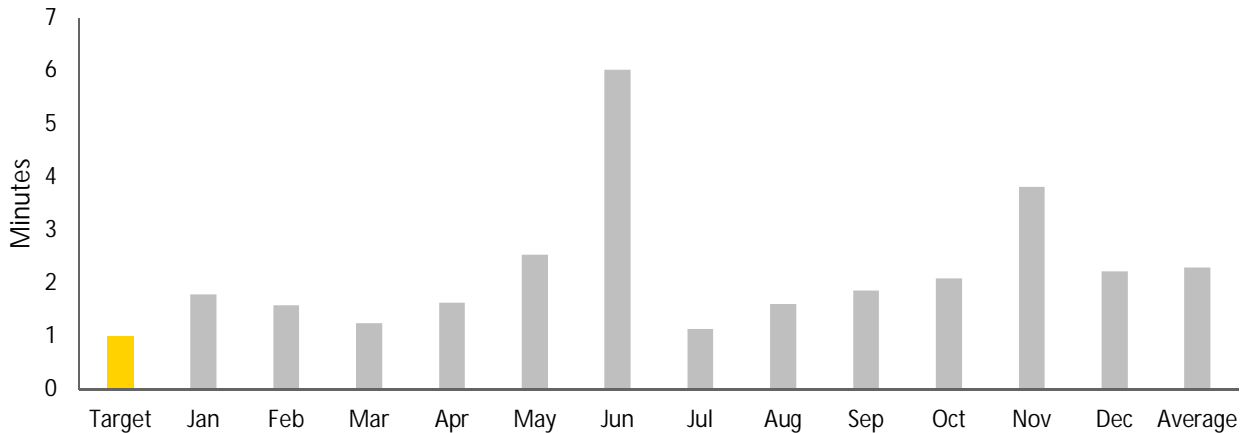
- ▶ Privacy verification
- ▶ Collaboration with the customer to offer solutions and alternatives
- ▶ Treating caller's circumstance with tact and empathy
- ▶ Executing the correct solution

In addition to reviewing call quality, TO managers evaluate the quality of Travel Specialists' work products such as communications with workers and accuracy of booking details.

SLAs related to call activity are tracked through Genesys; a call center technology software used by the TO. The TO's call service performance monitoring is on par with leading practice as they measure the same metrics as those measured at large call centers to evaluate staff performance and value provided to customers. These measures (call quality, average speed of answer, live answer rate and first call resolution) are reported up to SCS leadership against pre-defined targets on a monthly basis and the TO identifies causes or issues that may have led to missed targets, if applicable.

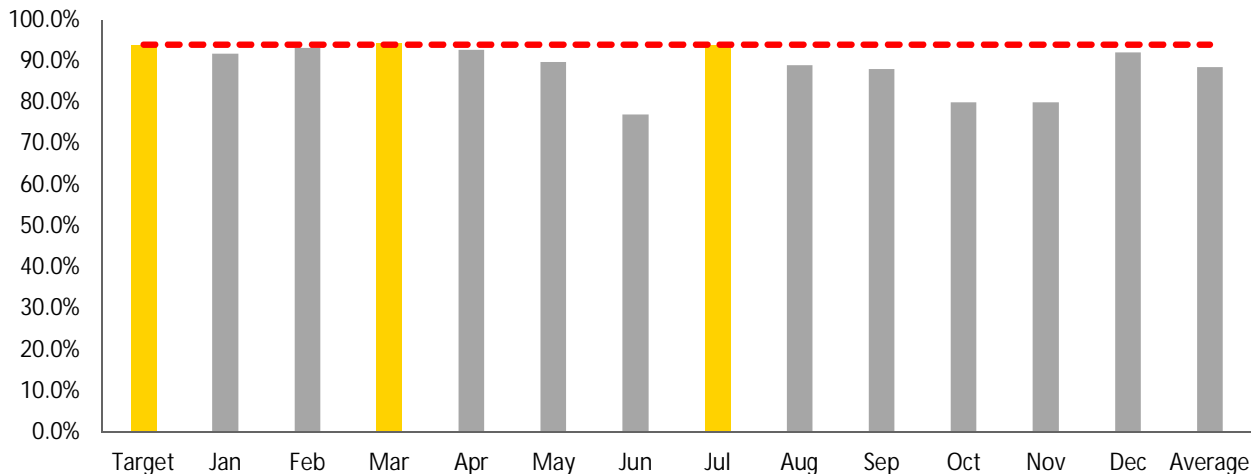
The “Service Delivery” section of the report highlighted a key concern among workers who received travel services, which was a need to reduce wait times for phone service. Review of SLA-performance data showed the average speed of answer (“ASA”) is tracked and monitored. The target for the ASA metric is set at 1 minute, which is longer than the industry standard of 30 seconds. In 2019, the TO consistently fell short of achieving this SLA and did not meet their target in any month (see below):

2019 Monthly ASA



Another important call-related metric is the live answer rate, which measures the number of calls answered against the total number of calls received. A low live answer rate means that customers are calling the TO, waiting to speak to a Travel Specialist, and dropping the call when they are unable to reach the Specialist. In 2019, the TO set the live answer rate target at 94%, which resembles the industry standard at 92% to 95%. Although the TO achieved the target in certain months, they fell short of their target at 88.5% for the year.

2019 Monthly Live Answer Rate



Observation 3: Review of performance data showed that average speed of answer and live answer rate for the TO consistently fell short of target in 2019.

Priority: High

SLA-achievement for call activities ensures that the TO is offering a high-quality and timely service to workers, thereby minimizing their stress during a difficult time.

Recommendation 3: The WSIB should explore opportunities and formalize initiatives to improve SLA-achievement for TO call-related metrics. Efforts to improve efficiency, particularly as noted in recommendation 2, will also have an associated benefit of increasing Travel Specialists' call availability and improving these metrics.

Management response: The WSIB agrees with the recommendation. The WSIB will:

- Review workforce management metrics and ensure that the end-to-end process following the call is included in target set.
- Assess the connection between travel call volumes and claim volumes and use predictive modelling to gain a deeper understanding on volumes and short/long term staffing requirements.
- Implement technology to help Travel Specialist improve their response time and performance. This includes utilizing technology from travel providers in Q3 2020 and longer-term transformational projects including the Core Services Modernization and a self-serve portal.

In addition, Live answer rate and average speed of answer have continued to improve in 2020 through the following:

- Travel staff roles being merged in Q4 2019 reduced hand offs and improved the customer experience. Merging of the roles required several months of training and upskilling.
- Weekly dashboard was created for management to review and monitor performance
- Work Force Management review initiated to look at the manual work pre and post phone calls to be included in metrics, and availability matching peak call volumes
- Updated technology implemented in Q3 2020 making it easier for travel staff to complete travel requests
- Continued focus by management to look at continued improvements

Primary owner: Vice-President Service Excellence

Secondary owner: Sr. Vice-President, Claims Transformation & Vice-President, Corporate Business Information & Analytics

Target completion date: Q2 2021, Q4 2024 (Technology)

External service provider performance management

Preferred service providers provide the majority of travel services to customers. Definition of SLAs in the contractual agreements formalizes service quality expectations. Review of vendor contracts showed that SLAs are defined for each vendor based on the service type. SLA-achievement is not uniformly tracked and reviewed by the TO. With 30 vendor contracts and reporting spread across various individual reports, it is difficult to obtain a holistic picture of vendor performance at any point in time.

The TO also tracks any complaints concerning vendor service quality that is received from their customers. However, there is no formal mechanism to integrate complaints into vendor business reviews. Based on interviews, the TO reviews all available reporting prior to quarterly vendor business reviews. However, the results of the business reviews and impact on performance are not documented and consolidated in a manner that would enable a view into vendor performance over the life of the contract.

Please refer to the “Contractor and service provider management” section that follows for EY’s observation around service provider performance management.

Staff training

Sufficient training ensures that staff have the necessary skills to effectively conduct their duties and responsibilities.

With the creation of the Travel Specialist role in 2019, extensive training was required to ensure a smooth transition for staff and reduce the impact on service delivery. The WSIB contracted their TMC to address training needs and enable new Travel Specialists to familiarize themselves with the booking tools. In addition, all Travel Specialists are required to be TICO-certified which provides them with the base level of knowledge to conduct travel management activities. The TO also maintains a suite of procedures that include step-by-step instructions on how to use the different booking tools and execute travel reservations in compliance with the WSIB policies.

5. Contractor and service provider management

The TO currently manages 30 contracts with external service providers to deliver transportation and accommodation services to workers and the WSIB staff.

The contracts and claim-related spend are summarized below:

Service Type	Number of contracts	2019 spend on preferred vendors (000's)
Hotel	20	\$2,300
Taxi	5	\$21,400
Airline	3	\$1,800
Rail	1	\$467
Travel Management Company	1	\$108

Contract and service provider management practices

Contract and service provider management at the WSIB is decentralized, which means that the TO is responsible for effectively managing its own contracts and service providers. The TO currently has one Project Manager conducting contract management activities for the 30 contracts summarized above.

At a high-level, vendor management consists of the following three phases:



To ensure that contracts and service providers are managed efficiently and effectively, it is crucial to achieve an optimal mix of knowledgeable staff and enabling technology.

Document review and interviews demonstrated that procurement practices are established at the WSIB and understood by the TO. Based on the type of service provider, standard terms and conditions, preferred rates, relevant SLAs and reporting requirements are defined in the various contracts. The TO identifies and writes business cases to procure services with due consideration given towards expected costs and benefits to optimize economy.

The SLAs defined in the contracts are related to provision of timely, high-quality service to workers and the WSIB staff and timely reporting to the TO. The WSIB has the ability to issue penalties based on shortfalls in SLA-achievement. However, the lack of a holistic view into vendor performance has resulted in the WSIB not issuing penalties to date. Quarterly business reviews are held with vendors to discuss performance, highlight risks and identify opportunities for improvement. The outcomes of business reviews are integral to evaluating and improving vendor performance over the life of the contract, ultimately generating value for workers and WSIB staff.

Observation 4: A holistic approach to monitor vendor performance, SLA-achievement and realized benefits through the life of the contract is not defined.

Priority: High

Leading vendor management practices include ongoing performance monitoring and the establishment of a formal feedback loop from service recipient to service provider, which enables continuous improvement through the life of the contract. In addition, benefits are also tracked to evaluate whether the service provider was valuable to the organization and service recipients.

Appropriate documentation of performance management activities over service providers increases the likelihood that gaps in SLA-achievement will be followed up on. In addition, the documentation will serve as a basis for contract renewal decision when required.

With 30 contracts to monitor, the ability to have a summary view performance for each of the vendors would enable effective and efficient contract management.

Recommendation 4: The WSIB should bolster documentation around service provider performance monitoring and establish a formal feedback loop with service providers. Methods to consolidate and simplify performance monitoring, such as the development of a PowerBI dashboard tracking aspects including SLA achievement, benefits realized to-date, and customer service complaints should be considered.

Management response: The WSIB agrees with the recommendation. The WSIB will:

- Include recommendations in upcoming procurements - 2021 and beyond
- Explore opportunities to improve current contracts and SLA monitoring
- Enhance data oversight and performance monitoring for contracts, including utilizing PowerBI to consolidate metrics and provide performance summary

- Consider establishing for a centralized contract management function overseeing all preferred travel providers
- Explore long-term technology solutions through Core Services Modernization and Electronic Provider Services transformational multi-year programs to improve vendor management practices through increased automation and data capacity.

Primary owner: Vice-President, Service Excellence

Secondary owner: Sr. Vice-President, Claims Transformation & Vice-President Corporate Business Information & Analytics

Target completion date: Q4 2021, Q4 2024 (Technology)

Volume of Service Providers

Interviews found that over time, the TO has been identifying the ideal number of service providers that would allow for a balance between maximizing service coverage and cost savings while minimizing administrative effort and burden. As noted above, the TO has established 30 contracts with different vendors. With taxi services making up an increasing portion of travel spend, the TO has managed to consolidate the number of taxi providers to a total of five contracts. A review of the contracts showed that four out of five taxi providers deliver services within or around the Greater Toronto Area.

Observation 5: There is an opportunity to better leverage the rapid increase in taxi spend to consolidate the number of taxi providers to ease contract management efforts and drive more competitive rates.

Priority: Low

Interviews indicated that the Travel Office has evaluated and re-negotiated preferred rates in the past. Periodic review of activity levels and agreements with vendors will allow for the TO to identify opportunities for cost savings on an ongoing basis. Reducing the number of vendors, with consideration given towards not impeding vendor competition, will simplify reporting and promote efficient contract management.

Recommendation 5: The WSIB should evaluate opportunities to consolidate the number of taxi vendors and drive more competitive rates where possible.

Management response: The WSIB agrees with the recommendation. The WSIB will:

- Explore the opportunity to consolidate the number of the taxi vendors to drive more competitive rates in contracts up for procurement in 2021 and beyond
- Update the procurement requirements to include an enhanced transaction volume discount model for pricing
- Explore technology to streamline booking and reduce rates. This includes the Core Services Modernization and self-serve portal functionality

Primary owner: Vice-President, Service Excellence

Secondary owner: Sr. Vice-President, Claims Transformation

Target completion date: Q2 2021, Q4 2024 (Technology)

Appendix A: Jurisdiction scan responses

Questions	WorkSafe BC	Workers Compensation Board of Alberta	Workers Compensation Board of Manitoba
High-level description of travel service approach	Internal travel arrangement team specific to coordinating travel for workers. Travel booking is performed by an external travel agency.	Internal travel arrangement team specific to coordinating travel for workers. Non-complex travel booking is performed by travel arrangers on the Concur platform while complex travel bookings are sent to their Travel Management Company.	Travel reservation activities are outsourced to an external travel agency.
Do you provide workers with assistance in booking travel (air/rail/taxi/hotel) to appointments such as healthcare or return-to-work training? If so, do you use a Travel Agency, internal travel office or other approach?	<p>WorkSafeBC (WSBC) aids workers with these travel types. They have an internal call service (similar to WSIB) which workers use to contact WorkSafeBC and arrange travel. The travel arrangement team may also contact workers when travel is approved by the case manager.</p> <p>They use an external travel agency to complete the booking process for hotel and air only and arrange taxi accounts internally through various taxi companies.</p>	<p>WCB AB once had a full onsite travel office with 7 employees. Travel reservation activities are now conducted by claim owners. Most travel spend is for air and hotel bookings.</p> <p>WCB Alberta's TMC offers full-service agent bookings when needed and assist in the negotiation of airline and hotel contracts. The TMC also liaises with hotels to ensure that they are adhering to corporate guidelines for claimant travel.</p>	The WCB of MB uses a preferred travel agency to book all travel for injured workers and staff. Staff from the medical aid area contact their travel agency to book injured worker travel and administrative/executive assistants contact the agency for staff travel.
What types of Travel Services are offered to workers (e.g. air, rail, hotel, taxi, etc.)? Which programs that you offer require travel (e.g. injured workers, return to work, etc.)?	Air/Hotel/Taxi are primarily what is arranged for injured workers. These services are used as needed if a worker is required to travel from their place of residence to medical treatments. All related expenses including out of pocket costs are reimbursed if reasonable.	<p>WCB AB offers air, hotel, taxi and bus services to our workers. If required and on rare occasions, rail service is also provided.</p> <p>Travel can be required across a variety programs such as RTW, injured worker, rehab, medical appts, surgeries, and retraining/schooling.</p>	<p>Air, hotel and taxi services are offered as required.</p> <p>Travel services are primarily for injured workers to attend medical appointments, claim-related hearings, rehabilitation and training.</p>

<p>Do you maintain a preferred supplier list for travel providers? If yes, how would you describe the level of compliance in using preferred suppliers?</p> <p>a. Do you receive any type of rebates from ground transportation companies or any other providers?</p> <p>b. How do you measure cost savings as a result of contracts?</p> <p>c. How do you measure effectiveness of your Travel Management Company and ensure that lowest cost flights are utilized?</p>	<p>Due to the multiple locations that BC's injured workers may travel between, local travel service providers are used where possible. As such, a list of ground/air/hotel service providers by location is maintained.</p> <p>Corporate discounts for air travel based on volume for large and small airlines. However, discounts for small airlines are rarely seen due to low volumes.</p> <p>The TMC helps track savings for air based on cost and credit reconciliation and comparable with other service providers for that service.</p> <p>Quarterly reviews of travel costs and credit management are performed.</p>	<p>WCB AB maintains preferred supplier contracts with 2 airlines and 2 hotels.</p> <p>Outside of these providers, the WCB AB piggybacks off under the provincially negotiated rates where possible.</p> <p>WCB AB does not measure cost savings on the preferred suppliers</p> <p>TMC reports are periodically reviewed to investigate missed savings and determine whether higher cost travel selections were justified.</p> <p>WCB AB has also removed the very lowest flight option that offers no chance for refunds or credits. This is because travellers' arrangements may need to be changed and flexible fares are required to accommodate for this.</p>	<p>A preferred travel agency is used for flights. WCB MB does not receive rebates for ground transportation.</p> <p>Cost savings and effectiveness of travel agency are not measured.</p>
<p>Could you please provide a brief description of the end-to-end process for providing travel services?</p>	<p>For air travel, the external travel agency makes the booking through their booking system and sends confirmation to the worker and WorkSafeBC</p> <p>For taxi travel, WorkSafeBC internal staff send authorization letters with to and from information and direct billing instructions to avoid the worker from having to pay out of pocket</p>	<p>For air and hotel travel, the travel arranger receives approval to book travel through a task assigned within the claims management system. The arranger then confers with the worker and books travel through their system which notifies the travel provider. Booking information is sent to the worker and placed in the claim file.</p>	<p>Not provided</p>
<p>How does your organization coordinate taxi bookings for workers across the province?</p>	<p>For taxi travel, WorkSafeBC internal staff reach out to taxi vendors and send authorization letters with to and from information and direct billing instructions to</p>	<p>Taxi bookings are either directly booked by WCB AB or pre-authorized. The worker may also book taxi appointment and submit to the WCB AB for reimbursement.</p>	<p>Pre-authorized by WCB MB or directly booked by the worker and submitted for reimbursement</p>

<p>a) Direct booking by your organization</p> <p>b) Pre-authorization by your organization and direct booking by the worker</p> <p>c) Booking by the worker and post-approval</p> <p>d) Other method (please explain)</p>	<p>avoid the worker from having to pay out of pocket</p> <p>Any travel where taxi services were used prior to approval from case manager (CM) follows a reimbursement request and approval process. If there is no documentation on the workers claim, then the travel officer (aka payment officer), will contact the CM for approval prior to processing the reimbursement</p>		
<p>Do travel providers (taxi companies, airlines, etc.) bill their services directly to your organization or does the worker pay for the service and request reimbursement?</p>	<p>WSBC make use of direct billing from all providers as often as possible, however, some instances require the worker to pay out of pocket and then get reimbursed.</p>	<p>All flights and hotels are booked and paid for directly by the WCB. On occasion, workers will pay and submit receipts for reimbursements on taxis.</p>	<p>Taxi travel may be directly billed or reimbursed to the worker.</p> <p>Airline travel is charged to corporate credit card by preferred travel agency</p>
<p>Please describe your experience with providing travel services to Foreign Agricultural Workers once they return to their home country. How have you overcome the inherent challenges in serving them effectively and efficiently (e.g. prepayment of anticipated travel expenses)?</p>	<p>WSBC has setup a series of out-of-country and out-of-province fee codes that are used to entitle and reimburse workers for expenses. The Worker may submit a reimbursement form through mail or fax. Once received, this information is validated by WSBC and if deemed eligible, a cheque is generated and sent to the worker.</p> <p>If WSBC is made aware of the treatment provider whether out of country/province, they will attempt to set up direct billing to avoid inconveniencing the worker.</p> <p>Currently have a mechanism to pay workers in the foreign currency of the country they</p>	<p>Not provided</p>	<p>There are language barriers, additional time required to translate documents, and inherent challenges with distance and dealing with a foreign/unknown healthcare system. Generally, WCB MB pays what is requested by the worker or provider due to lack of experience and ability to validate what would be a reasonable expense.</p>

	<p>reside in, which is a challenge for direct billing.</p> <p>Logistical challenges and time delays for international mail are also inherent in these cases and are dealt with on a case by case basis. Challenges can be quite unique, which has made it difficult to set up a process to uniformly handle foreign cases.</p>		
<p>Do staff travellers in your organization use an online self-portal for booking their corporate travel? If yes, what platform are they using?</p>	<p>Staff travel is currently arranged via an electronic form that is filled out by the staff traveller and is routed to management for approval and then to the travel agent to book the required travel. The confirmation is then sent to the traveller and invoiced to accounts payable.</p> <p>WSBC does not have a self-serve portal for direct booking.</p>	<p>Yes, however some staff travellers will book directly with the airline or hotel based on the reason for their travel.</p>	<p>WCB MB does not have a self-serve portal for direct booking.</p>
<p>Please share any new or innovative processes or technology that have helped you improve the efficiency or effectiveness of delivering travel services to your client base.</p>	<p>WorkSafeBC has implemented a preferred provider program for hotels. Through their travel agency, a “top 3” list of hotels and taxi providers is maintained for each city that is used by our workers and staff. This helps create efficiencies and reduce invoicing challenges/errors as these providers have become familiar with our process.</p> <p>In the future, WSBC is exploring the use of virtual credit cards for hotel initially and hope to eventually expand to all travel. The aim is to reduce or eliminate duplicate or over-billing as well as remove the need for a worker to produce a credit card for damages, etc.</p>	<p>WCB AB will be moving to a virtual travel platform and are also investigating the use of virtual payments to make hotel stays smoother for the injured workers.</p>	<p>None to share</p>

	<p>WSBC is also exploring opportunities to have the internal travel arrangers use the same booking software as the travel agent to get real time information on air travel. This reduces the risk of tickets selling out due to the time delay between requesting the travel agency to book travel to when the booking is actually completed.</p>		
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Appendix B: Audit criteria and assessment

Assessment Area	Audit Criteria	Conclusion
Governance	1. Oversight activities ensure that the Travel Office is operating appropriately and in a manner, which enables achievement of the WSIB's strategic objectives and plans.	Met
Service offerings and financial management	2. The Travel Office's service offerings and financial management activities are sufficient and appropriate.	Partially met
Service delivery and technology support	3. Processes are established, and technologies are applied to enable user-friendly, effective and efficient service delivery for the Travel Office	Partially met
Performance management and data analytics	4. Travel Office performance is monitored and reported regularly to enable continuous improvement and facilitate decision making.	Partially met
Contractor and service provider management	5. The Travel Office manages contracts and external service providers appropriately to deliver services and expected value.	Partially met

Appendix C: Interviewee listing

During the course of the audit, EY consulted the following WSIB staff:

1. Director, Customer Care
2. Business Projects Manager, Travel Office
3. Manager, Travel Office
4. Three Travel Specialists
5. Senior Business Analyst, CBIA
6. Director, Finance
7. Director, Internal Controls
8. Manager, Procurement Quality
9. Executive Director, Specialized Customer Services
10. Vice President ("VP"), Service Excellence
11. Senior VP, Claims Management
12. Director, Operations
13. Manager, Return-to-Work
14. Manager, CBIA
15. Manager, Financial Planning & Analysis

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