



Board of Directors Election  
Allied Representatives  
**2020**



## Message from GBTA President:

It's election year! And despite COVID-19, GBTA elections will move ahead as planned at our virtual annual meeting on December 7th, 2020. Before this meeting, our members will have the opportunity to take part in our election process. This year, we have one position open for election, Allied Member at large, and one partial term to fill for Direct Member at Large. In this online brochure, you will find information and platform statements from all of our Allied Member candidates. I

encourage you to take some time to review the information and get to know your candidates, so you can make an informed choice when you cast your vote.

Prior to the Virtual Annual Business Meeting on Monday, December 7 you will have the opportunity to view each candidates' campaign speech and vote online. Each candidate will have their campaign speech posted online by November 13. You will be able to cast your vote for the next leadership electronically from Friday, November 13 through Friday, December 4. In order to vote, you must be a current Allied Member of the Association.

If you have questions about your membership status, please check with GBTA's Member Care Team at [membercare@gbta.org](mailto:membercare@gbta.org) before November 11.

The GBTA Board of Directors serves as the governing body of the Association and is responsible for establishing the focus and direction of the Association. This is your opportunity to vote for the candidates you believe will best lead our organization, so I strongly encourage you to participate in the GBTA electoral process.

Our Association's continued success is driven by the dedication of many member volunteers. Keep our Association strong by being an active participant and cast your vote!

Best Regards,

A handwritten signature in black ink, appearing to read 'Bhart Sarin', enclosed within a hand-drawn oval shape.

Bhart Sarin  
President  
Global Business Travel Association



The Board consists of thirteen (13) Members comprised of the President, Vice President, Immediate Past President/Chairman of the Board, President of the Chapter Presidents' Council, President and Vice President of the Allied Leadership Council, five (5) Direct Members at large, and two (2) Allied Members at large. Additionally, the Executive Director & COO also serves as an *ex officio* Member of the Board.

**The open Board positions in the 2020 Election are as follows:**

- Allied Member at Large (1) - for a term of two years to begin at the close of GBTA Special Meeting December 7, 2020 through the close of 2022 GBTA Convention.

The 2020 elections will be conducted online through a third party service. Online voting will open Friday, November 13 and will close Friday, December 4 at 5:00 PM EST. Results of the elections will be announced on Monday, December 7. Individuals must be an Allied member of GBTA to be eligible to vote. As there are no Direct seats open for election, only Allied members will be voting. As per GBTA By-Laws regarding Eligibility to Vote:

**Section 2.2.1 Direct Members.** The Association will have a class of voting members consisting of individuals whose primary responsibility is to either (A) procure business travel services for the employees of a corporation or organization, or (B) promulgate and administer travel policies for a corporation or organization ("Direct Members"). Direct Members shall have all privileges of membership in the Association as set forth in these Bylaws. Direct Members shall elect seven (7) Directors to serve on the Board as more fully set forth in Section 3.2.2.

**Section 2.2.2 Allied Members.** The Association will have a class of voting members ("Allied Members"), who are not Direct Members, and who are regularly employed by any of the following businesses ("Eligible Business(es)"): (See Bylaws for list) Any Eligible Business that is a parent or holding company with franchisees or local units shall pay a single initiation fee as set forth by the Board, and the individuals employed by such Eligible Business, its franchisees, or local units may join as Allied Members. Such initiation fee shall be distinguishable from any annual dues payment requested by the Association of each Allied Member. Allied Members may vote in the election of the two (2) Allied Member Directors, as more fully set forth in Section 3.2.3, and on matters referred by the Council of Allied Leadership. Allied Members shall have no other voting rights.

**Please note to be eligible to vote, you have until Wednesday, November 11 by 5:00 PM to renew your membership.**



## **GBTA Board of Directors Election 2020 Process**

According to the Bylaws, each GBTA member will be permitted to cast one vote for respective vacant seats on the Board by electronic ballot.

### **VOTING Eligibility**

Individuals must be a Direct or Allied Member of GBTA to be eligible to vote.

In the United States, if you are a community member in a Chapter, but not a global member, you will not be eligible to vote.

If you have questions about your membership status or voter eligibility, please contact GBTA's Member Care Team at [membercare@gbta.org](mailto:membercare@gbta.org) , before November 11.

GBTA will send candidate platform speech videos to GBTA members.

GBTA Allied members will have the opportunity to elect one (1) Allied Member at Large for a term of two years.

Electronic voting will open November 13 through December 4, at 5:00 PM EST. Please note, the 2020 election process will be entirely virtual and votes will be cast online through a secured third party site powered by Election Services.

Election results will be announced at the Monday, December 7, Virtual Annual Meeting.



## Meet Your 2020 Candidates



### **Bruce McIndoe, President, McIndoe Risk Advisory LLC**

#### **Industry Experience:**

40+ years; 21 years supporting the travel industry focusing on travel risk policy & solutions; have advised nearly all Allied domains (TMC, OTA, OBT, Airline, Hotel, Ground, GDS, Meeting & Events, Data Processors, and others around risk management, technology and data integration.

#### **Industry Positions:**

- McIndoe Risk Advisory LLC – President (Independent consultant to the travel industry)
- WorldAware (formerly iJET International) – Founder 1999 and former CEO
- Homeland Security Technical Advisory Council (HSTAC) – Task Force Member
- Global Business Travel Association (GBTA)
  - Risk Committee - Americas) – Co-Chair, Member; Europe – Liaison Member
  - Industry Advisory Council (IAC) - Member
  - Conference Attendee since 2001, Speaker, Program Developer, Exhibitor
  - Travel Risk Management Maturity Model (TRM3) - Project Lead
- Travel Again – Policy Advisor
- Association of Corporate Travel Executive (ACTE) – Member, Speaker
- Risk & Insurance Management Society (RIMS) Member, Speaker
- ASIS International (Security Trade Assoc.) Member, Speaker
- Business Travel News (BTN) - Named “25 Most Influential”

#### **Relevant Experience:**



- Corporate Boards: CSSi, iJET/WorldAware (30+ years)
- Higher Education Board of Trustees: Allegheny College (12 years)
- Non-Profit: World Trade Center Institute (6 years)

#### **Education:**

- Allegheny College, B.S. Physics
- Johns Hopkins University, M.S. Computer Science
- University of Maryland, Global Campus (UMGC) – Adjunct Professor, Criminal Justice, Security

### **GBTA ALLIED MEMBER PLATFORM STATEMENT**

#### **Background and Experience – Unique, broad perspective**

I have been an engaged Allied member and supplier to GBTA for the last 20 years. Through these roles working with many suppliers directly and my work in GBTA committees, I have gained a unique perspective and understanding of the entire travel supplier ecosystem. I believe that gives me the **credibility to represent a broad swath of the Allied membership** from airlines to TMCs and OTAs to hotels, ground transportation and most of the technology and data providers. In addition, I am currently engaged in the meetings and events industry both as a speaker and risk/security practitioner providing assessments and on-site support.

#### **BLUF (Bottom Line Up Front) – Current GBTA Issues**

**I know what GBTA has been for 20 years**, and more importantly all the good things it has done for its members. However, in the last few years, I feel that **the organization has drifted away from its core focus of creating value for its membership around the world**. GBTA became too inwardly focused and US-centric.

This drift has **resulted in a major loss of confidence** in the GBTA leadership and its ability to lead our industry collectively and aggressively, especially in a moment when we are all dealing with the devastating effects of the coronavirus pandemic, the most impactful event to the travel industry in anyone's lifetime.

**We need to do better** - for our members and the industry. With a long road to recovery ahead, we need a strong GBTA to rally around and help us all pull together to bring the industry back as quickly as possible.

If elected, **my primary mission** will be to bring my decades of experience in both corporate and non-profit governance to 1) build on the MCI-USA (the company hired by GBTA to review the association practices) findings and 2) be a driver for important and lasting changes to the GBTA Board, changes which will be codified in updated bylaws and result in new association leadership.



With a strong and effective association in place, **my secondary mission** will be 1) to focus on increasing our global membership and their engagement, and 2) to use the voice of our collective economic power (US\$ 1.4 Trillion worldwide) to create and execute on initiatives for the recovery of our industry.

### **1- Organizational Governance –Organizational and Bylaw Changes**

We have a great opportunity in the next 9 months to retool and refocus GBTA – 1) to reestablish its leadership position in the business travel industry and 2) to provide greater and effective value for all GBTA members.

I have over 30 years' experience and continue to actively serve on the boards of both corporate and non-profit organizations. **I will bring this experience to support the work outlined in the recent MCI-USA report, notably in the areas of defining the Board composition, Board committees, membership structure, and leadership term limits.**

I will also be tirelessly committed to one of the most important findings - **the imperative to build a truly international Board to reflect our global membership.** Global Board representation along with greater diversity in representation from key membership constituencies will make GBTA stronger and more adaptive to the changing travel landscape. We need to embrace and quickly respond to change.

### **2- International Experience – understanding the world outside the USA**

Having grown up in London, having traveled and worked in over 60 countries, and having operated a global business with operations and partnerships in Asia, Africa, Europe and the Americas, I am committed to being an advocate for the membership around the world.

**GBTA needs to diversify its operations and governance to become a more globally engaged and effective organization.** Each nation and region operate in a unique environment. As leaders, we need to embrace each of these for GBTA to become a more relevant and stronger association.

I will advocate for strengthening our regional operations to include marketing and membership support. We need to get closer to our members, understand their specific needs, and communicate with them more directly. We need to deliver content and programs that members can apply to their respective travel programs and demonstrating to leadership the value of GBTA membership.

### **3- Ready. Safe. Travel – a critical GBTA initiative**

**As an established leader in the global travel industry, I am uniquely qualified to lead, enhance and communicate this GBTA initiative.**



The membership and leadership of GBTA need to amp up its engagement and advocacy around the return of business travel. The single thread through this maze centers on the safety of our travelers and the required myriad of workers that enable travel to happen. Through sound risk management principles, consistent industry practices, clear and factual communications and demonstrated results, we can help the various industry stakeholders embrace the task of getting people back on the road. We need to earn and maintain the trust of the traveler and the organizations responsible for their health and safety.

**My experience in developing and delivering travel risk management solutions and programs for thousands of companies, of all sizes and industries around the world, gives me unique knowledge and insight to contribute significantly to this initiative.** I have been engaged since early March focusing on the impacts of COVID-19 to organizations and the travel industry. I regularly brief executives in the pharma, manufacturing, technology and travel industries on the COVID-19 forecast, impacts on geopolitics and the economy, as well as the upcoming big changes that we will see as a result of the pandemic.

**The GBTA “Ready. Safe. Travel.” campaign is a great start.** Now we need to quickly help each member have a role, each chapter to be engaged, and every supplier dedicated to supporting this singular focus. We have already lost precious time. With so many friends and colleagues impacted by the pandemic, we need to move as quickly as possible. I will be a steady and experienced hand as we collectively navigate our way back from the “dark days” of 2020.

**Thanks for reading this far and I look forward to your support at this critical time for our industry.**

LinkedIn: <https://www.linkedin.com/in/mcindoe/>

Twitter: <https://www.twitter.com/BruceInMD>

Media Attributions: <https://mcindoeiskadvisory.com/media>



**Phillip Peña, Regional Director, Global Sales, Mandarin Oriental Group**

### **GBTA VOLUNTEERISM AND EXPERIENCE**

- Allied Member (2002 – 2010, 2013 – Present)
- Direct Member (2010 – 2013)
- GBTA Global Accommodations Committee (2014 – 2018)
- GBTA Global Accommodations Committee Vice-Chair (2016 -2018)
- GBTA Annual Convention Moderator/Panelist (2013 – 2020)
- GBTA Canada Annual Convention Moderator/Panelist (2017 – 2018)
- NYCBTA Board Nominations Review Committee (2019 – 2020)
- NYCBTA Monthly Education Days Moderator/Panelist: (2018 – 2019)
- GBTA Ladders Program Mentor (2016 winning team, 2017, 2019 and 2020)
- Institute of Travel (ITM) Member (2015 – Present)
- GBTA Accommodations RFP Taskforce (2018 – Present)

### **INDUSTRY AND PROFESSIONAL EXPERIENCE**

For the past 7 years, I have been responsible for leading the Corporate Segment sales strategy globally for Mandarin Oriental Hotel Group as well as being the global Account Manager for many multi-national corporations in the Americas, United Kingdom and Europe. I also provide guidance and direction on the development and creation of global sales initiatives and sales programming for Mandarin Oriental Hotel Group in the Americas.

Prior to Mandarin Oriental Hotel Group, I was the Senior Vice President, Head of Global Hotel Program and Ground Transportation at Citigroup. In this role, I was accountable for the overall strategy and management of the Global Preferred Hotel, Extended Stay/Service Apartment and Global Ground Transportation Programs. Additionally, I had responsibilities for the overall communication and marketing of all Global Travel Department policies and programs.



I have also served as an adjunct faculty member at New York University's (NYU) Tisch Center for Hotel and Tourism Management where I taught undergraduate courses in guest services, public relations, and sales and marketing.

I am a graduate of the University of Texas at Austin.

## **OTHER INDUSTRY ACTIVITY AND PROFESSIONAL SPEAKING ENGAGEMENTS**

- STR SHARE CENTER: Graduate Student Project Judge, 2016 and 2018
- TRAVEL & LEISURE MAGAZINE, BUSINESS TRAVEL ADVISORY BOARD: Featured Speaker, 2016 Fall Quarterly Meeting

## **PLATFORM STATEMENT**

I'm running for GBTA's Board of Directors because I have been committed to this global association for 18+ years and firmly believe its purpose, mission and longevity. I believe that we are at a crossroads within the organization and within the global business travel industry. It is time to reassess and recalibrate the association to better serve its members across all regions and to establish a new foundation for the next generation to build from.

My value set:

1. I am an **industry expert and thought leader** with more than 20 years in the global hospitality industry. I bring global experience and perspectives from both the Allied and Direct Member side, having worked on both the buy and sell sides of our industry. This has proven to be highly valuable when bringing together consensus to key stakeholders and decision makers, but also while serving in the role of Vice-Chair of the GBTA Accommodations Committee. I have the courage to drive collaboration and build consensus and these skills will be needed to help reset the organization.
2. I am **passionate about guiding and mentoring** individuals. As someone who has always appreciated and benefitted from the coaching of supervisors and industry leaders, I feel it is my time to give back. Therefore, I have participated in the GBTA Ladders Program over the past 5 years. This program is highly valuable and helps to develop ourselves and others. I will continue to endorse platforms like this but also advocate for the creation and development for other types of programming and continuing education that will serve its membership in new and exciting ways.
3. **I know how to lead during difficult and challenging times.** Throughout my career I have experienced trying moments in our industry, from September 11 through the years of the Great Recession to the current global pandemic which we are navigating. What I have learned when faced with adversity is that leadership matters. It matters to the those around us and those we represent. Serving as a member of the GBTA Board of Directors would allow me to bring my



expertise, business acumen and levelheadedness to the organization as we weather this storm to become more resilient, stronger, and better together.

I am an independent thinker and plan to bring some great new ideas to the table. If elected to the board, I plan to serve all its members and ensure that the association remains inclusive and diverse in all possible ways. Now is the time to reinvent ourselves and I want to help GBTA reestablish itself as the leading and most prominent association of our industry. We need new voices; we need a new vision.

### **MY SOCIAL MEDIA PLATFORMS**

- Read my Bio on LinkedIn: <https://www.linkedin.com/in/philippjena/>
- Follow my GBTA Journey on Instagram: <https://www.instagram.com/ppena4gbta/>



**Bernd Schulz, Senior Director Business Development MEE & EMEA South, Concur**

### **Experience**

I don't look it, but I already spend 30+ years in the Travel Industry 😊  
In various positions and functions with a strong focus on business travel.

### **Industry Positions**

**Senior Director Business Development** MEE & EMEA South, Concur (current position)

**CEO & Managing Director**, i:FAO AG / cytric (2017-2018)

**Managing Director**, Amadeus Germany (2012-2016)

**Global Travel Manager**, Siemens AG, Germany (2008-2012)

**Head of Global Travel Procurement** and Travel Manager Germany, Siemens AG (2000-2008)

**President**, DER Travel Service Ltd. Toronto, Canada (1997-1999)

**Office Manager**, DER Germany (1993-1997)

Plus, various positions at DER before, also in Tokyo and Chicago. Getting old....

### **GBTA and other associations**

Member of the GBTA European Advisory Board since 2016

GBTA Advisory Board Sponsor of GBTA's European Technology Committee (since 2020)



Member of the VDR Board, GBTA's German Partner Association (2013-2019)

Sponsor of VDR Technology Committee (2015-2019)

VDR Representative for Public Relations in Berlin (2018-2019)

Various representative meetings and functions for VDR in Brussels at the EU Commission

Member of the VDR Airline/Flight Committee (2004-2010)

Board Member of TIAC, Tourism Industry Association Canada (1997-1999)

## **2020 Platform statement**

My strong desire and believe is that business travel needs a global association – with the focus on the word **Global!** Our GBTA is in the best position to become truly global; to influence political decisions and to develop global standards while respecting the local and regional requirements and flavor; to organize great networking events, so we can meet industry colleagues and friends around the globe; and to offer training, webinars, job certificates, and so much more. We need this more than ever, need this to drive toward a harmonized handling of the COVID-19 virus at airports, airlines, hotels and all other traveler touch points.

What happened to GBTA in 2020 was painful for me to see. I have a strong believe in the potential and benefits of GBTA and the need for change.

### **My position and believe, if selected to the Board, is to help drive this change.**

Change GBTA for the better, make it modern and robust to weather the aftereffects of the most difficult time this industry has seen yet. To accomplish this, GBTA needs to:

- **Become truly international**
  - The Board needs to have representation from around the world. The main continents should be represented by one Allied and one Direct member, yet the board size should stay at a reasonable size.
- **Foster and respect regional and local GBTA Associations and Partners**
  - Stronger support the regional structures in Europe, LATAM and APAC
  - Investment in regional support, e.g., staffing, promotion, regional content and member acquisition
  - Reduce the U.S.-Headquarter-thinking and change to a global structure
- **Adopt transparency as the new standard**
  - Open, frequent, and relevant communication to the members
  - An administered mechanism for feedback and member questions
  - Board discussions and decisions need to be public



- Full transparency on GBTA's financials in a timely manner
- **Change the status of Allied members**

Without the Allied members GBTA would not exist. Allied members are supporting GBTA financially and with specific know-how in all areas. We need to...

  - allow Allied members to be part of GBTA strategy decisions
  - support Allied members in creating qualified leads for their business
  - give Allied members a better experience when paying for conferences and marketing packages
  - be more flexible in our support of the Allied members
  - reduce the differences between Allied and Direct members and give Allied members full voting rights
- **Higher investment in technology, tools and innovation**
  - Provide a modern website with global, regional and local content
  - Support direct members with the benchmark tools they need
  - Increase activities into the job board in times where our members have been laid-off or are on furlough programs

In all the above I refrained from saying "I will". If selected, I am only one part of the GBTA Board. Many changes require new bylaws. This is what **I will** focus on and fight for.

I have a proven track record from my volunteer activities at VDR and GBTA Europe to listen to its members and push initiatives forward. My strong believe is that the Association is a service to its members and a board member is also "just a member". Certainly, with more obligations and visibility but with no need of special treatment.

To me as a person, I have recently married and living the thrills of a patchwork life with 5 children in the ages 10 to 18. I really enjoy cooking and some of my specialties include traditional Kale and Sausage (a northern German specialty), Jack Daniels Baked Beans and all variations of noodles that kids love. And the challenge to cook a family dinner every evening during the week, which is relaxing me from the day at work. I like being in motion and learning new things; just last year I obtained my private pilot license.

Let me finish with a snapshot of my track record in business travel, although I do not think this should be rated highest when voting for me. I have sat on many sides of this industry. While at DER Travel I've worked for a TMC, a Travel Agent, an Airline Consolidator, a Group Travel Organizer, a Tour Operator and as an Incoming specialist. I was in Procurement and the global Travel Manager for a mega corporate. I even worked for a GDS, an OBE and am now at Concur. I've a strong technology background



and been in leadership roles since a time when travel and tourism combined generate a gross revenue of only \$3.47 billion. That was in 1993.

But all this does not matter now. The focus must be on the future, to repair GBTA's reputation, to make it truly international, and to become the GO-TO Association around the globe.

I would be thrilled to have your vote!