ABC 2015 Fall Summit

How to Book a Charter Bus for University Events

September 10, 2015

THE BUS REQUEST FORM
The Bus Request Form

https://afd.calpoly.edu/
The Bus Request Form

**Sample:**

<table>
<thead>
<tr>
<th><strong>Description</strong></th>
<th><strong>Details</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date of Trip</strong></td>
<td>03/28/2015</td>
</tr>
<tr>
<td><strong>Bus Number</strong></td>
<td>3A5645G</td>
</tr>
<tr>
<td><strong>Group Name</strong></td>
<td>ABC Corp.</td>
</tr>
<tr>
<td><strong>Group Leader</strong></td>
<td>John Doe</td>
</tr>
<tr>
<td><strong>Number of Participants</strong></td>
<td>50</td>
</tr>
<tr>
<td><strong>Activity</strong></td>
<td>Event Daytrip</td>
</tr>
<tr>
<td><strong>Nature of Trip</strong></td>
<td>Special Event</td>
</tr>
<tr>
<td><strong>Out of Town</strong></td>
<td>San Francisco</td>
</tr>
<tr>
<td><strong>Type of Trip</strong></td>
<td>Group Charter</td>
</tr>
<tr>
<td><strong>Purpose</strong></td>
<td>Transportation</td>
</tr>
<tr>
<td><strong>Trip Information</strong></td>
<td>Date: 03/28/2015</td>
</tr>
<tr>
<td><strong>Departure Time</strong></td>
<td>07:00 AM</td>
</tr>
<tr>
<td><strong>Return Time</strong></td>
<td>05:00 PM</td>
</tr>
<tr>
<td><strong>Destination</strong></td>
<td>San Francisco, CA</td>
</tr>
<tr>
<td><strong>Contact Information</strong></td>
<td>John Doe, 555-1234</td>
</tr>
</tbody>
</table>

**OUT TO QUOTE**
The Trip #: What does it mean?
- Include this trip # in all correspondence regarding trip
  - Easier Information Searches
- Synonymous to a Quote #
- Submit forms 30 days in advance
- Quote return time of 3-4 days
Completed:
- Bus Request Form
- Out to Quote

Up Next:
- Bus Pricing Matrix

Check Point 1
- Department: Trip has been organized into Bus Request Form
  - Form submitted to SBSS
- SBSS: sent your request to the Bus Companies for quotes
- Bus Companies: Determining a quote based on the information of the Bus Request Form

THE BUS PRICING MATRIX
This is the 5% Small Business Credit that is awarded to American Star Trailways and Santa Barbara Airbus per state law.

It is for evaluation purposes only
The Bus Pricing Matrix

- Is emailed to requestor
- Requestor forwards matrix to Approving Official for signature
  - Approving Official is "someone who holds a minimum employee classification of Department Head, Department Chair or Management Personnel Plan (MPP) or confidential."

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**American Tour** is the lowest evaluated quote. Based on the itinerary provided, the invoice total is estimated to be $1,980.00.

**Note:** If you go over the hours estimated from the itinerary, there will be an added charge of $22.50 per hour.

Please review and have your approving official send me an email to accept the quote. Once I have their approval I will contact the company and confirm the booking. Feel free to contact me if you have any questions.

Regards,
Stan Lee

Student Assistant
Contracts, Procurement, Risk and Real Estate Mgmt.
California Polytechnic State University, SLO
(805) 756-2252
purchasing@calpoly.edu
Check Point 2

- Department: Received pricing matrix and forwarded for approval
  - Sent to approver for signature
- SBSS: Waiting for approval email
- Bus Companies: *Do not have anything booked* based on the preliminary quote

```
Completed:
- Bus Request Form
- Out to Quote
- Bus Pricing Matrix

Up Next:
- Approval
```

APPROVAL
Approval

- Approving Official is “someone who holds a minimum employee classification of Department Head, Department Chair or Management Personnel Plan (MPP) or confidential”
- Approval sent through e-mail
- Once received is sent to bus company for Final Booking

Dear Stacie,

I approve the cost for the attached bus quote. Thank you for your help.

Kris McKinlay
Assistant Dean, Orfalea College of Business
The Final Booking

Hello,

American Star had the lowest evaluated quote for the trip on 4/15/2015-4/17/2015: UAS Aircraft Design trip to General Atomics and Northrop Grumman. The recap is attached.

Lacey, please send over your confirmations with reference to PO #4315.

Thank you all for your quotes.

Regards,

[Signature]

Student Assistant
Contracts, Procurement, Risk and Real Estate Mgmt.
California Polytechnic State University, SLO
(805) 756-2272
purchasing@calpoly.edu
Check Point 3

- Department: Has submitted Approval to SBSS
- SBSS: Notified the Bus Companies of the outcome of the quote comparison
- Bus Companies: have the date and bus *tentatively* booked

Completed:
- Bus Request Form
- Out to Quote
- Bus Pricing Matrix
- Approval
- Final Booking

Up Next:
- Trip Confirmation

TRIP CONFIRMATION
Trip Confirmation

Confirmation Bus Trip F 041513-1 to General Atomics & Northrop Grumman

Trip Number: 041513-1

Date: April 15, 2013 3:58 AM

Hello,

Attached is the bus confirmation for the UAS Aircraft Design team trip to General Atomics & Northrop Grumman, trip number 041513-1.

Please review this confirmation, sign indicating your approval, and send it back to me.

If you have any questions about the trip, or are of the itinerary changes, contact the bus company directly. I have provided the representative information below.

You will need to send this confirmation to a complete itinerary no less than two weeks in advance of your trip; this is essential in securing its success.

Laura Silver
Association Chair
(805) 541-3899
lsilver@americanbassinet.net

Let me know if you require any further assistance in this matter.

Regards,

[Signature]

Student Assistant
Contacts, Programs, Risk, and Real Estate Mgmt.
California Polytechnic State University, RLO
(805) 756-2323
program@calpoly.edu

abc.afd.calpoly.edu
Trip Confirmation

- Look over to ensure correct details
- Forward to Approving Official for signature
- Send the Confirmation to the Bus Company
  - CC: Procurement
- Your trip is now booked
Check Point 4

- SBSS: Sent dept. the Trip Confirmation from the Bus Company
- Department: Reviewed the Trip Confirmation, signed, and sent it to the Bus Companies
- Bus Company: Documented changes and *completely booked trip*

Completed:
- Bus Request Form
- Out to Quote
- Bus Pricing Matrix
- Approval
- Final Booking
- Trip Confirmation

Up Next:
- Itinerary Changes

ITINERARY CHANGES
Itinerary Changes

- Requestor/Department should contact the bus company
- Re-Quoting, a.k.a. getting Procurement involved
  - Determined on a case-by-case basis
  - Rule of Thumb:
    - +/- 10 hours will most likely require re-quote
    - Send an e-mail to purchasing@calpoly.edu with current itinerary and proposed changes

PAYING THE INVOICE
Paying the Invoice

- Requestor/Department will receive invoice
- Stamp with “Ok to Pay”
- Write Chart of Accounts on invoice
- Bus Company should include PO #
- Have Approving Official Sign
- Send to AP for processing

TIPS AND TRICKS

We asked the Bus Companies what they wanted you to know…
Tips & Tricks

- Be flexible on your amenities
- Pay your invoice promptly
- List how much luggage you will be taking in the Special Instructions section
- Ensure there is parking available for the bus at your destination

Tips & Tricks

- Peak Months
  - Charter:
    - February, March, April, October, and November
  - Shuttle:
    - April, May, June, September, and October

<table>
<thead>
<tr>
<th>Monthly Averages</th>
<th>2015 Total Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month</td>
<td>%</td>
</tr>
<tr>
<td>January</td>
<td>5.6%</td>
</tr>
<tr>
<td>February</td>
<td>9.1%</td>
</tr>
<tr>
<td>March</td>
<td>10.0%</td>
</tr>
<tr>
<td>April</td>
<td>43.4%</td>
</tr>
<tr>
<td>May</td>
<td>29.6%</td>
</tr>
<tr>
<td>June</td>
<td>66.7%</td>
</tr>
<tr>
<td>July</td>
<td>0.0%</td>
</tr>
<tr>
<td>August</td>
<td>10.5%</td>
</tr>
<tr>
<td>September</td>
<td>13.0%</td>
</tr>
<tr>
<td>October</td>
<td>31.3%</td>
</tr>
<tr>
<td>November</td>
<td>100.0%</td>
</tr>
<tr>
<td>December</td>
<td>0.0%</td>
</tr>
</tbody>
</table>
BUS CONTACTS

Stacie Silva, Student Assistant
(805) 756-2232
purchasing@calpoly.edu

Jeanette Paolucci, Buyer I
(805) 756-2234
jepaoluc@calpoly.edu