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:**

**Bus Charter Quote Request**

**General Information**
- **Department:** Aerospace Engineering
- **Group Leader:** Robert McDonald
- **Group Name:** AAM - Micrinf Design
- **Travel Leader:** Robert McDonald
- **Number of Travelers:** 20
- **Travel Leader Cell Phone:** 404-517-1895

**Bus Information**
- **Number of Buses Requested:** 1

**Do you require any of the following?**
- [ ] Restroom
- [ ] Video/DVD Player
- [ ] WiFi
- [ ] ADA Accessible Bus
- [ ] How many passengers will need accommodation?

**Trip Information**
- **Round Trip**
- **One Way**
- **Multiple Destinations**
- **Date:** Friday, March 6, 2015
- **Pickup Time:** 2:30 a.m.
- **Pickup Location:** Cal Poly Performing Arts Center

**Departure Time from Previous Location**

<table>
<thead>
<tr>
<th>Time</th>
<th>Destination Location (Include address)</th>
<th>Destination Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:00 a.m.</td>
<td>McDonald's for Breakfast</td>
<td>West</td>
</tr>
<tr>
<td>6:45 a.m.</td>
<td>One Northside Grammar Ave, El Segundo, CA 90245</td>
<td>West</td>
</tr>
<tr>
<td>3:10 p.m.</td>
<td>In-N-Out Dinner Stop</td>
<td>West</td>
</tr>
<tr>
<td>6:10 p.m.</td>
<td>Cal Poly Performing Arts Center</td>
<td>Cal Poly of Arts</td>
</tr>
</tbody>
</table>

**Special Instructions**

---

**Bus Charter Quote Request**

**Dates of Trip:** March 6, 2015
- **Quote Number:** 0301S-2
- **Quote Due:** 2/18/2015

**Changes to Trip:** Department is responsible for notifying the contractor with any details that change prior to the date of the trip as this may affect driving times and the price quoted.

**Cancellation:** Department is responsible for full price of trip if cancellation occurs 72 hours or less prior to the date of the trip.

**Overnight Trips:** DEPARTMENT is responsible for booking a hotel room for the bus driver and paying the invoice.

**Email completed form to purchasing@calpoly.edu**

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**Contractor Information**
- **Company:**
- **Quoted by:**
- **Number of Buses (Quoted):**
- **Size(s) of Bus(es) (Quoted):**
- **Hourly rate if trip goes beyond hours specified in itinerary:**
- **Number of hours quoted based on itinerary:**

**Total Bus Quote:**

(CAL POLY reserves the right to request requotes if any changes occur after the due date of the quote.)
The Bus Request Form

Sample:

<table>
<thead>
<tr>
<th>Dates of Trip:</th>
<th>March 14, 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quote Number:</td>
<td>090445-S</td>
</tr>
<tr>
<td>Quote Due:</td>
<td>2/25/15 12pm</td>
</tr>
</tbody>
</table>

**General Information**
- Department: BioResource and Agricultural Engineering
- Group Leader: Daniel Hawes
- Number of Travelers: 20
- Travel Leader: Daniel Hawes
- Travel Leader Cell Phone: 858-354-0501

**Bus Information**
- Number of Buses Requested: 1
- ADA Accessible Bus: [ ]
- Restroom: [ ]
- Video/DVD Player: [ ]
- WiFi: [ ]

**Trip Information**
- Date: 3/6/2015
- Pick Up Location (include address): Cal Poly, Bldg 8 front parking lot

<table>
<thead>
<tr>
<th>Departure Time from Previous Location</th>
<th>Anticipated Arrival Time</th>
<th>Destination Location (include address)</th>
<th>Destination Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>6:00am</td>
<td>8:30am</td>
<td>Alta Irrigation District, 289 North St., Dunbar, CA 93461</td>
<td>Field Trip Location</td>
</tr>
<tr>
<td>10:00am</td>
<td>10:55am</td>
<td>Orange Cove Irrigation District, 1130 Park Blvd, Orange Cove, CA 93460</td>
<td>Field Trip Location</td>
</tr>
<tr>
<td>11:00am</td>
<td>12:15pm</td>
<td>Lunch in Chorro, CA 93010</td>
<td>Mall</td>
</tr>
<tr>
<td>12:35pm</td>
<td>12:45pm</td>
<td>Chorro Irrigation District, 327 S. Chorro Blvd, Chorro, CA 93010</td>
<td>Field Trip Location</td>
</tr>
<tr>
<td>2:15pm</td>
<td>2:45pm</td>
<td>San Luis Canal Company, 11704 W. Henry Miller Ave, Dos Palos, CA 93610</td>
<td>Field Trip Location</td>
</tr>
<tr>
<td>3:25pm</td>
<td>6:30pm</td>
<td>Cal Poly, Bldg 8 front parking lot</td>
<td>Cal Poly End of Trip</td>
</tr>
</tbody>
</table>

**Special Instructions**
- Might include some dirt road driving at various locations.
- CHANGES TO TRIP: Department is responsible for notifying the contractor with ANY details that change prior to the date of the trip as this may affect driving times and the price quoted.
- CANCELLATION: Department is responsible for full price of trip if cancellation occurs 72 hours or less prior to the date of the trip.
- OVERTIME trips: DEPARTMENT is responsible for booking a hotel room for the bus driver and paying the invoice. DEPARTMENT must confirm there is ample parking room for the bus.
- I verify that I have read and understand the above conditions: [ ]

**Contractor Information**
- Company: [ ]
- Quoted by: [ ]
- Number of Buses Quoted: [ ]
- Seats of Bus(es) Quoted: [ ]

**Bus Quote**
- Total Bus Quote: [ ]
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**
Hello,

I would like a quote for the attached bus request. Please list the coach size and specify the number of hours each day that will be quoted based on the itinerary.

If you have any questions or need further information, don't hesitate to contact me.

Please return your quote by 4/16/2015 at 11:00 a.m. Thank you.

Regards,
Stacie Silva

Student Assistant
Contracts, Procurement, Risk and Real Estate Mgmt.
California Polytechnic State University, SLO
(805) 756-2232
purchasing@calpoly.edu
Check Point 1

Completed:
› Bus Request Form
› Out to Quote

Up Next:
› Bus Pricing Matrix

- 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
# The Bus Pricing Matrix

## Bus Request Pricing Matrix

<table>
<thead>
<tr>
<th>Date(s):</th>
<th>4/30/2015</th>
<th>5% small business credit</th>
<th>Total Less 5% Small Bus Credit</th>
<th>Notes:</th>
<th>Amt./Hr. Over Quoted Time</th>
<th>Quoted Time (Hours)</th>
<th>Invoice Total Should Be:</th>
<th>Prepared by:</th>
<th>Quote Due:</th>
<th>Trip Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$1,000.00</td>
<td>$ (50.00)</td>
<td>$950.00</td>
<td>(4) 20+ PX</td>
<td>$82.50</td>
<td>10</td>
<td>$1,000.00</td>
<td>Stacie Silva</td>
<td>4/7/2015</td>
<td>043015-2</td>
</tr>
</tbody>
</table>

*small business discount applied for quote evaluation only*

<table>
<thead>
<tr>
<th>Department:</th>
<th>Department</th>
<th>Destination:</th>
<th>Destination</th>
</tr>
</thead>
</table>

---

**Please note:** There is a 72 hour cancellation policy. Any group canceling within 72 hours of the trip date will be responsible for 100% of the trip cost.**
The Bus Pricing Matrix

- This is the 5% Small Business Credit that is awarded to AmericanStar Trailways and Santa Barbara Airbus per state law.
- It is for evaluation purposes only.

<table>
<thead>
<tr>
<th>AmericanStar Trailways*</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
<td>1,000.00</td>
</tr>
<tr>
<td>$</td>
<td>(50.00)</td>
</tr>
<tr>
<td>$</td>
<td>950.00</td>
</tr>
<tr>
<td>(1) 20+ PAX</td>
<td></td>
</tr>
<tr>
<td>$</td>
<td>82.50</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>1,000.00</td>
</tr>
</tbody>
</table>
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.”
The Bus Pricing Matrix

Hello,

I have attached the matrix outlining the quotes for the requested bus trip to San Mateo Makers' Faire.

**American Star** is the lowest evaluated quote. Based on the itinerary provided, the invoice total is estimated to be $1,598.00. Note that if you go over the hours estimated from the itinerary, there will be an added charge of $82.50 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,
Stack Silva

Student Assistant
Contracts, Procurement, Risk and Real Estate Mgmt.
California Polytechnic State University, SLO
(805) 756-2232
purchasing@calpoly.edu
Check Point 2

Completed:
› Bus Request Form
› Out to Quote
› Bus Pricing Matrix

Up Next:
› Approval

□ 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
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
Re: Bus Quote Request # 042415-3 OCOB Finance Students Century City

From: Kristina I. McKinlay
To: Contracts & Procurement
Cc: Scott Dawson

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,

Stacie Silva

Student Assistant  
Contracts, Procurement, Risk and Real Estate Mgmt.  
California Polytechnic State University, SLO  
(805) 756-2232  
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 # 041515-1 to General Atomics & Northrop Grumman

From: Contracts & Procurement/Risk & Real Estate Mgmt.
To: Allison Crille

Hello,

Attached is the bus confirmation for the UAS Aircraft Design bus trip to General Atomics & Northrop Grumman, trip number 041515-1. Please review this confirmation, sign indicating your approval, and send it back to me.

If you have any questions about the trip, or if the itinerary changes, contact the bus company directly. I have provided the representatives information below. You will need to send the bus company a complete itinerary no less than one-week in advance of your trip; this is essential in ensuring its success.

Lacey Rivera
American Star
(805) 543-9999
lacey@americanstarinc.net

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

Regards,
Stacie Shue

Student Assistant
Contracts, Procurement, Risk and Real Estate Mgmt.
California Polytechnic State University, SLO
(805) 546-2323
purchasing@calpoly.edu
### Trip Confirmation

**Trip Date:** Saturday, April 5, 2014
**Return Date:** Saturday, April 5, 2014

**Client Information:**
- **Client:** Cal Poly - Men's Soccer
- **Company:** Cal Poly
- **Client Ref 1:** PO 4316 WIFI
- **Client Ref 2:** Men's Soccer

**Itinerary:**

<table>
<thead>
<tr>
<th>Spot</th>
<th>Depart</th>
<th>Time</th>
<th>Arrive</th>
<th>Time</th>
<th>RefSpot</th>
<th>Time</th>
<th>ReRefSpot</th>
<th>Time</th>
<th>RefDrop</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cal Poly Performing Arts Center</td>
<td>4/5/14</td>
<td>12:00</td>
<td>Grand Avenue</td>
<td>4/5/14</td>
<td>12:30</td>
<td>SLO Transit Center</td>
<td>4/5/14</td>
<td>12:45</td>
<td>Cal Poly Performing Arts Center</td>
<td></td>
</tr>
<tr>
<td>1 Grand Ave</td>
<td>SLO</td>
<td>SLO</td>
<td>12:45</td>
<td>SLO</td>
<td>SLO</td>
<td>12:30</td>
<td>SLO</td>
<td>12:45</td>
<td>1 Grand Ave</td>
<td></td>
</tr>
<tr>
<td>San Luis Obispo, CA</td>
<td>1 Grand Ave</td>
<td>SLO Transit Center</td>
<td>1 Grand Ave</td>
<td>SLO</td>
<td>SLO</td>
<td>12:30</td>
<td>SLO</td>
<td>12:45</td>
<td>1 Grand Ave</td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
- Two buses - each bus to make two trips.
- Alcoholic beverages will be served on the bus.
- One or more passengers will be under 21 years of age.
- No changes.
- Changes.

**Balance Due:** April 15, 2014
**Total:** $1,040.00

**Acceptance**

**Client ID:** 1533
**Company:** Silverado Stages, Inc.
**Client Ref 1:** 33
**Client Ref 2:** 493
**Destination:** San Francisco, CA

**First Pick-up**
- **Pick-up Date:** Fri 4/17/2015
- **Time:** 18:00

**First Drop-off**
- **Back Date:** Sat 4/18/2015
- **Time:** 17:00

**Notes:**
- Detailed itinerary to be provided.
- Group will provide hotel room for driver in hotel with parking.

**I have checked all the details above and agree that they are correct.**

**Signature:**

**Date:**

---

**American Star**

837 Oak Park Blvd #204
Paso Robles, CA 93440
Phone: 805-543-9299
Fax: 805-543-9215

**Cal Poly University Poly Cultural**
1 Grand Ave
San Luis Obispo, CA 93401

**By signing, I acknowledge I have reviewed and agree to the attached terms and conditions and Addendum A, if applicable.**

Visit us on the web at www.americanstarstages.com

abc.afd.calpoly.edu
**Trip Confirmation**

**Transportation Invoice #**

**Date:** 4/3/15

**Billing Information:**
- **Event:** Cal Poly Music Festival
- **Transport Company:** SLO Safe Ride
- **Employee Contact:**
  - Noah Raynor
  - Co-Owner and COO
  - (805) 620-7233
  - SLOSafeRide@gmail.com

**Length of Service**

<table>
<thead>
<tr>
<th>Description</th>
<th>Date(s)</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.5 Hours</td>
<td>4/17/15-4/19/15</td>
<td>$1360.00</td>
</tr>
</tbody>
</table>

**Total Due:** $1360.00

**Charter Party Signature**

- Trip Number: 041715-5
- Balance Amount: $1360.00
- Balance Due Date: 4/24/15

Make all checks payable to SLO Safe Ride.

If you have any questions concerning this invoice, contact Noah Raynor at (805) 620-7233.

Thank you for your business. We do expect payment within 21 days, so please process this invoice within that time. There will be a 5% charge per month on late invoices.

---

**Footer:**
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
Completed:
› Bus Request Form
› Out to Quote
› Bus Pricing Matrix
› Approval
› Final Booking
› Trip Confirmation

Up Next:
› Itinerary Changes

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*
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</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month</td>
<td>trips/mo</td>
<td></td>
</tr>
<tr>
<td>January</td>
<td>15.0</td>
<td></td>
</tr>
<tr>
<td>February</td>
<td>34.3</td>
<td></td>
</tr>
<tr>
<td>March</td>
<td>27.7</td>
<td></td>
</tr>
<tr>
<td>April</td>
<td>31.7</td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>23.3</td>
<td></td>
</tr>
<tr>
<td>June</td>
<td>3.7</td>
<td></td>
</tr>
<tr>
<td>July</td>
<td>8.7</td>
<td></td>
</tr>
<tr>
<td>August</td>
<td>10.7</td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>17.3</td>
<td></td>
</tr>
<tr>
<td>October</td>
<td>25.5</td>
<td></td>
</tr>
<tr>
<td>November</td>
<td>30.0</td>
<td></td>
</tr>
<tr>
<td>December</td>
<td>7.0</td>
<td></td>
</tr>
</tbody>
</table>

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

abc.afd.calpoly.edu