



## Purchasing Department

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1830 S. Nogales Street, Rowland Heights, CA 91749

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### Conference & Travel Cheatsheet

#### BUSINESS TRAVEL DEFINITION

Per Board Policy 3350, travel for business purposes is defined as "*conferences, workshops, seminars, or other meetings serving educational purposes or being of benefit to the District.*" This includes travel at no cost to the District for registration, hotel, or airfare, but could incur mileage and/or meal costs.

#### POLICY

Please refer to Board Policy 3350 and Section IV (Travel & Conference) of the Purchasing Manual.

#### PROCEDURES

As soon as you become aware of the need for travel for business purposes, please do the following:

1. **FIRST:** Complete the *Request to Attend Conference Form* and obtain all appropriate approval signatures. No arrangements for registration, hotel, or airfare should be made prior to obtaining approval to travel via the *Request to Attend Conference Form*.

**PLEASE NOTE: If the total estimated cost of the trip (including registration, hotel, airfare, meals, etc.) is over \$1,750, the travel must be Board-approved. As with travel approval, arrangements should not be made prior to Board approval.**

2. **SECOND:** After you have obtained approval, you can contact vendors, as follows:
  - a. Conference – Contact the vendor in charge of conference registration. Their information is usually provided on the conference flyer, brochure, and/or website.
  - b. Hotel – For best pricing, contact the hotel where the conference is taking place (if applicable). The conference vendor may also provide you a listing of hotels in the area that are offering a special price for conference attendees.
  - c. Airfare – Contact Away We Go Travel at (562) 690-3339 to obtain a quote for the required air travel. Please do not book air travel directly with an airline or using a personal credit card.

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#### 3. THIRD: Submit Smartetools Requisitions, as follows:

##### a. CONFERENCE REGISTRATION

###### i. Required Attachments:

- Flyer/brochure for conference, showing date, location, and subject matter
- Registration form/confirmation
- W-9 Form, if it is a new vendor
- Signed/approved *Request to Attend Conference Form*

###### ii. Description – Include all details of the registration, including confirmation number and attendee information. If more than one person attending, please include a separate description for each attendee. **Please note: If the travel cost is over \$1,750, please also include the Board Approval Date and Board Agenda Item Number.**

###### iii. Comments – Include the following:

- Vendor contact person and contact information
- If the vendor accepts a PO or a check
- If hotel is included in the registration form/confirmation

##### b. HOTEL

###### i. Required Attachments:

- Flyer/brochure for conference, showing date, location, and subject matter
- Hotel confirmation
- W-9 Form, if it is a new vendor
- Signed/approved *Request to Attend Conference Form*

###### ii. Description – List all details/costs as they are shown on the hotel confirmation. **Please note: If the travel cost is over \$1,750, please also include the Board Approval Date and Board Agenda Item Number.**

###### iii. Comments – Include the following:

- Hotel contact person and contact information
- If the hotel accepts a PO or a check
  - If hotel requires a check, please request an invoice from the hotel that indicates "Invoice" somewhere on the document.
  - If the hotel does not accept POs or checks, please contact Purchasing for further assistance.

##### c. AIRFARE

###### i. Required Attachments:

- Quote from Away We Go Travel
- Flyer/Brochure for conference, showing date, location, and subject matter
- Signed/approved Request to Attend Conference Form

- ii. Description – Provide all details/costs provided on the quote. If more than one person attending, please include a separate description for each attendee. **Please note: If the travel cost is over \$1,750, please also include the Board Approval Date and Board Agenda Item Number.**

## **CANCELLATIONS**

### Conference/Hotel

Any cancellations or changes are the responsibility of the school site/department (person who initiated the travel and/or requisitions). Cancellations that are not done in a timely matter may cause loss of funds to the school site/department; therefore, please ensure that you notify the appropriate vendors as soon as possible when the need for a cancellation or change arises.

### Airfare

Please note that Airfare is usually non-refundable and any changes to flights, if possible, will likely be completed for an additional fee. Please inquire with Away We Go Travel for your options.

## **QUESTIONS**

If you have any questions or need additional assistance with arranging travel, please contact Purchasing at (626) 854-8374.