

Ohio University Group Travel and Event Procedures

Effective Monday, April 1st, 2019, Christopherson Business Travel (CBT) is Ohio University's new Preferred Supplier for all Travel related business (Individual Travel, Group Travel, and Events).

DEFINITIONS

- **Group Travel** is defined as any travel with 10 airline tickets or 10 hotel rooms
- An **Event** is defined as a planned business occurrence happening at a determinable time and place, that will need any combination of airfare, hotel rooms, transportation, catering, conference rooms, equipment and/or venues
- **OHIO customer** is any person from Ohio University that is requesting group travel or event assistance.
- **Supplier** is the company providing the travel service, it could be an airline, hotel, conference venue, busing company, caterer, etc.
- **CTA** is the Central Travel Account card to be used to pay for group travel and event purchases.
- **BobcatBUY (BCB)** is the electronic purchasing system that will be used for suppliers of group travel and events that do not accept credit cards.

PROCEDURES

The following procedures must be followed by any OHIO customer that needs to book group travel.

- 1) The OHIO customer will fill out the [Ohio University Group Travel Request form](#), available on travel website or by calling CBT directly at 866-266-8806 and selecting option two (2) to request the form. The form requires the following information in order to provide sufficient details to CBT to engage with Suppliers and make the necessary arrangements:
 - a. Destination of travel
 - b. Hotel and hotel area you are interested in
 - c. Ground transportation, car rentals or other transportation needs
 - d. Catering or conference rooms
 - e. Required meals, e.g. free breakfast at hotel
 - f. Other specific desired amenities (e.g. audio/visual equipment, conference rooms, etc.)
 - g. Primary contact for the travel/event. There should only be one point of contact.
- 2) Send the completed Ohio University Group Travel Request Form to ohiogrouptravel@cbtravel.com. Once the form is sent, a travel planner from CBT will contact the OHIO customer within one business day to begin the process.

- 3) After initial contact the CBT travel planner will review the requirements on the form and determine if additional information is required from the OHIO customer.
- 4) Once the scope of the request is fully defined, the CBT travel planner will provide an estimate of total of cost, by supplier and determine if the university competitive bidding requirements have been met. If a single supplier is expected to exceed the bid limit of \$50K, an OHIO RFP will be required. The CBT travel planner will engage the OHIO Purchasing Commodity Manager, at pidcocm2@ohio.edu or 740-593-1683, to complete the necessary bidding process. CBT is a preferred supplier but the OHIO customer must still abide by the university competitive bidding requirements for any vendor that will exceed the \$50,000 bid limit.
 - a. Commodity Manager will work with OHIO customer to conduct Request for Proposal (RFP). See [RFP guidelines](#) for process.
 - b. Once RFP is completed and Supplier is selected, skip to step 6.
- 5) OHIO customer will receive via email, from the CBT travel planner the proposed options for their travel request. Proposal will include at a minimum;
 - a. Pricing
 - b. Locations
 - c. Amenities
 - d. Additional ConcessionsExpected response times for travel proposals from CBT are;
 - If provided 9 or more months out – 3 weeks to deliver proposal
 - If provided 4-9 months out - 2 weeks to deliver proposal
 - If under 3 months - 1 week deliver proposal
 - An exception for a quicker turnaround can always be requested .
- 6) OHIO Customer will confirm with CBT travel planner via email, their choice from the options presented. CBT travel planner will draft the contract (Contract will be a CBT contract with OHIO language) and confirm the details are correct with the OHIO customer. OHIO customer will approve the travel/event details within the draft contract with CBT travel planner.
- 7) CBT travel planner will present the contract to the Supplier and request additional information as follows:
 - a. CBT travel planner will provide Supplier with the appropriate state tax exemption certificate.
 - b. CBT travel planner will obtain insurance for non-national chain hotels, charters, buses, limos, and shuttles, restaurants, caterers, and non-traditional housing as defined in the [Contract and Insurance Matrix](#) and send Certificate of Insurance to contracts@ohio.edu.
 - c. CBT will obtain the food license (if needed for non-national chain catering/restaurants) and send the license to contracts@ohio.edu.
 - d. CBT will send contract to contracts@ohio.edu for review by OHIO Purchasing

- 8) OHIO Purchasing will review the contract, redline and return to CBT travel planner if the terms and conditions are not acceptable to OHIO. CBT travel planner will work with Supplier to negotiate the terms and conditions to get into compliance with OHIO requirements.
- 9) Once terms and conditions are finalized, OHIO Purchasing will sign the contract and return it to CBT. CBT travel planner will return the signed contract to the Supplier.
- 10) Once the contract is counter-signed by the supplier, CBT travel planner will provide the fully executed contract to contracts@ohio.edu and a reference copy to the OHIO Customer.
- 11) CBT travel planner will confirm with Supplier the acceptable methods of payment.
 - a. If Supplier accepts credit card, the CTA will be used. Skip to step 12.
 - b. If Supplier does not accept credit card payment, a PO must be issued through BCB
 - c. CBT will inform OHIO customer that a PO must be issued from BCB
 - d. OHIO customer will confirm if Supplier exists in BCB database
 - i. If Supplier is new to BCB, OHIO customer will request that CBT travel planner obtain, a fully executed supplier W9/W8 and the OHIO Supplier/Payee Information Form (SPIF).
 - ii. CBT will provide the completed W9/W8 and SPIF back to the OHIO customer for entry in a BCB services agreement requisition.
 - iii. OHIO customer will enter a services agreement requisition in BCB, attaching new supplier information and executed contract. If OHIO customer needs instructions for entering a services agreement requisition in BCB, please refer to the [Services Agreement Quick Reference Guide](#)
 - iv. PO is created in BCB and automatically sent to the Supplier
 - v. OHIO customer will request Purchasing to provide CBT travel planner with the PO.
- 12) CBT travel planner will secure and confirm the reservations by providing the Supplier either the CTA card with a credit card authorization form or confirm that the Supplier received the BCB PO.
- 13) CBT travel planner will provide the OHIO Customer with the official confirmation that travel/event is booked and confirmed with Supplier. Confirmation will include;
 - a. Travel details, itinerary, location, price, etc.
 - b. Deposit dates
 - c. Final payment deadlines
 - d. Dates to provide final rooming lists

- e. Air manifest (list must include names as listed on passport and government issued identification).
 - f. Other key deliverables
- 14) CBT will ensure all payments are made according to schedule and will work with OHIO customer to ensure all essential deliverables are met.
- 15) CBT travel planner will provide the OHIO Travel Manager and OHIO customer with the final trip documents 72 hours prior to the trip (includes charter #, bus times, vendor contact info, etc.).
- 16) For any travel assistance, changes, or disruptions during the trip/event, the OHIO customer should contact CBT at 866-266-8806 and select option one (1), to request assistance. If traveling internationally, contact CBT at 682-233-1914. For faster service after hours, reference code 6LV to identify yourself as an OHIO customer.
- 17) If any changes are made to travel during the trip, please contact the CBT travel planner assigned to the request to keep them apprised of the changes. This will ensure all final billings are accurate after travel.
- 18) CBT travel planner will receive the final invoice from Supplier and review for accuracy before sending to the OHIO customer.
- 19) OHIO Customer will substantiate the expense in Concur within 15 days of the event. If a BCB PO is the method of payment, the OHIO customer will forward the invoice to accounts.payable@ohio.edu for processing.
- 20) Any travel or event cancellations, or status inquiries of previously submitted requests, should be directed to the CBT travel planner assigned to original request.