INCOMING TRAVEL
TAKING THE GUESSWORK OUT OF GUEST-WORK

Individual Guests, Conference Attendees and Groups

Penn Travel Symposium
August 8, 2017
## Check List

<table>
<thead>
<tr>
<th>Space and IT Equipment</th>
<th>Food</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.jpg" alt="Image" /></td>
<td><img src="image2.jpg" alt="Image" /></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Overnight Lodging</th>
<th>Travel</th>
</tr>
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<tbody>
<tr>
<td><img src="image3.jpg" alt="Image" /></td>
<td><img src="image4.jpg" alt="Image" /></td>
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</tbody>
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ARRANGEMENTS

Food, Alcohol, Contracts

Angela Martyak, Procurement Specialist
Penn Purchasing Services
Purchasing Department Resource

- We can be a resource to assist with your event
- Our website has several resources at your finger tips:
  - Approved caterers list
  - Alcohol ordering guidelines
  - Supplier search functionality
  - New supplier request form
- Assist in contracting with hotels, venues, and caterers
  - Review and sign contracts
  - Assist in contract negotiations
  - Questions to ask suppliers when planning
Purchasing Department Resource

Making Purchases  Selecting a Supplier  Approved Caterers

Approved Caterers

Penn faculty and staff are encouraged to utilize Bon Appetit Catering services before contacting one of the approved caterers listed below. For more information on their services offered, please contact Bon Appetit Catering directly.

The University of Pennsylvania does not have a liquor license. Therefore, the host of an event must provide their own wine & spirits, and it must be purchased within Pennsylvania at a Pennsylvania Liquor Control Board or from Breakthru Beverage Group - PA (formerly Capital Wine & Spirits). Only Approved Caterers with Liquor Liability Insurance are permitted to provide bar service and serve alcohol at events on campus.

<table>
<thead>
<tr>
<th>Caterer Name</th>
<th>Number</th>
<th>Specialty</th>
<th>Phone Number</th>
<th>Liquor Liability Insurance</th>
</tr>
</thead>
<tbody>
<tr>
<td>12th Street Cantina Catering</td>
<td>93325</td>
<td>Variety</td>
<td>215-386-8799</td>
<td>Yes</td>
</tr>
<tr>
<td>1st &amp; Fresh Catering</td>
<td>452013</td>
<td>Variety</td>
<td>215-232-3762</td>
<td>Yes</td>
</tr>
<tr>
<td>Anew Catering and Events</td>
<td>535563</td>
<td>Variety</td>
<td>610-251-9500</td>
<td>Yes</td>
</tr>
<tr>
<td>Annemarie's Cuisine</td>
<td>460857</td>
<td>Variety</td>
<td>215-806-7675</td>
<td>Yes</td>
</tr>
<tr>
<td>Au Bon Pain Bakery/Café</td>
<td>470052</td>
<td>Variety</td>
<td>800-765-4227</td>
<td>No</td>
</tr>
</tbody>
</table>
How to Buy Wine and Spirits

Breakthru Beverage Group - PA is a University preferred contract supplier of wine and spirits. In addition to wine and spirits, University staff may purchase wines and spirits for consumption at approved on-campus University events and local dinners. **Alcohol may not be purchased for resale**, except by those University entities holding valid Pennsylvania liquor licenses. Wine/spirits purchases are **NOT exempt from Pennsylvania sales tax**.

For events outside Pennsylvania, the liquor laws of the state where the event is held will govern. In all cases, the alcohol must be used in accordance with the University Alcohol Policy.

Ordering Information

All wines and spirits must be purchased within Pennsylvania at a Pennsylvania Liquor Control Board (PLCB) wines and spirits store, or by placing a purchase order with Breakthru Beverage Group - PA. Please create a non-catalog request in BEN Buys for your requirements based on the order form that you complete with Breakthru Beverage Group - PA. For complete ordering instructions **CLICK HERE**.

Prior to placing a purchase order with Breakthru Beverage Group - PA, please contact the sales representative listed below to confirm the availability of your specific selections. Breakthru Beverage Group - PA offers free assistance with event planning, quantity selecting, and product recommendations. For a nominal fee, Breakthru Beverage Group - PA will deliver the products to your event on campus, or upon request will coordinate delivery with limited number of University Approved Caterers.

Small wine or spirits purchases made in person at a Pennsylvania Liquor Control Board (PLCB) store for **entertaining purposes only** can be purchased using the University issued **Bank of America Travel Card** and expensed via CONCUR. The University’s MasterCard Purchasing Card is **NOT** to be used for wine or spirit purchases.
Purchasing Department Resource

Supplier Search

Approved Suppliers can be searched in two ways:

- **Supplier Search by PO History** – This feature allows a user to enter descriptive words about a product or service (e.g., “pipette” or “advertising”), and then returns a list of Approved suppliers from which the University has purchased in the last 18 months. The listed results indicate whether or not each supplier is a Preferred Contract Supplier to the University, thereby removing the requirement for competitive bid.

- **Supplier Search by Classification** (see below) – This feature allows a user to check certain classification criteria (e.g. Minority, West Phila) as well as keywords to help identify Approved suppliers based on the selected criteria. As with the **Supplier Search by PO History**, the results indicate whether or not each suppliers is a Preferred Contract Supplier to the University, which removes the requirement for competitive bid.

If you still can’t find an approved supplier in the database for your needs, please consult with Strategic Sourcing by submitting an inquiry at sourcing@exchange.upenn.edu or by contacting the appropriate Sourcing Manager per the Staff and Responsibilities section of the Purchasing Services website.

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**Classification:**
- Small Business (SB)
- Woman Owned (W)
- Physically Challenged (C)
- LGBT Supplier (LGBT)
- Protected Veteran (V)
- Penn Marketplace (M)

**Local Supplier:**
- Philadelphia (P)
- West Phila. (U)

**Minority Type (Z):**
- Any Minority
- Asian
- Hispanic
- African American
- Native American
- Other

<table>
<thead>
<tr>
<th>Supplier Name</th>
<th>Supplier Type</th>
<th>Commodity</th>
<th>Postal Code</th>
<th>Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>03 WORLD LLC</td>
<td>Approved</td>
<td>SERVICES: GRAPHIC ART &amp; DESIGN</td>
<td>19125</td>
<td>P</td>
</tr>
</tbody>
</table>

[Reset search criteria]
Purchasing Department Resource

Purchasing Forms

Purchasing Services has provided links to forms, documents, and online request websites used in the purchasing and payment process at Penn. If you need help with the various forms and documents, direct your purchasing related questions to Purchasing Services and payment related questions to Accounts Payable.

- **Request to Add a new BEN Buys Supplier (US Supplier)**
  A form to submit a request to add a new US supplier to the BEN Buys Purchasing System approved supplier database. (PennKey Required)

- **Request to Add a new BEN Buys Supplier (Foreign Supplier)**
  A form to submit a request to add a new foreign supplier to the BEN Buys Purchasing System approved supplier database.
Purchasing Department Resource

Angela Martyak, Purchasing Services
Events, Catering, and Professional Services
amartyak@upenn.edu
www.purchasing.upenn.edu
AIR TRAVEL

Air Travel for Penn Guests or Program Participants

Amanda Bastelica, Program Coordinator
Penn School of Nursing
The Future of Nursing Scholars Program supports nurses to get their PhD in 3 years.

- Each year in August we bring our scholars to our Boot Camp, a three day event located in Princeton, NJ.
- Boot Camp is the first time we meet our newest cohort, which typically consists of about 50 scholars located at various schools throughout the country.
- Since our scholars’ grants do not start until the beginning of the Fall semester, we pay for all of their travel for this meeting.
Problem:
A Penn program has decided to pay roundtrip airfare for the participants.

However:
1. It is important to keep costs contained
2. It is to know the arrival and departure schedules of the attendees.

Solution:
Set up Concur Meetings (with World Travel’s assistance) to allow individuals to book their own flights based on program defined criteria.
Criteria? How specific can I get?

- Earliest Arrival Date; Earliest Arrival Time; Latest Arrival Date.
- Earliest Departure Date; Latest Departure Time.
- Open to One Way Trips – Yes or No.
- Must they fly into and out of Philadelphia or can they also use other airports such as Newark?
- Is Penn paying for the airfare – Yes or No. If yes:
  - Provide account code to charge.
  - Are approvals of the flight selection/price required – Yes or No. If yes, email address of approver is _______.
- Last date to book airfare in system.
- Do you want price limits based on lowest logical fare or location? If location based – what locations?
  - Example – West Coast $800; Midwest and South - $500; East Coast - $400.
  - If over those amounts, does the traveler pay the rest or would an approval be required?
STEPS:

1. Fill out form provided by Penn Travel Services
   a. Basic info about the event including name of program dates, Penn contact information
   b. # of Travelers
   c. Criteria

2. Email form to easleyh@upenn.edu

3. Penn Travel Services will contact World Travel and set up communications between the programmer at World Travel and the contact person for the Penn program

4. Provide list of travelers with email addresses to World Travel programmer

5. Send out instructions on booking airfare to the attendees

6. Approve airfares (if necessary based on criteria)

7. Receive copies of itineraries as they are successfully ticketed

8. Receive arrival and departure reports from World Travel prior to event.
GROUND TRANSPORTATION
Options for Penn Guests or Program Participants

Julianne Wisner, Marketing Manager
UBER
### Ground Transportation

<table>
<thead>
<tr>
<th>PROBLEM</th>
<th>OPTIONS</th>
<th>SOLUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Transporting a large group of people to/from campus&lt;br&gt;• Lady Liberty bus service no longer an option</td>
<td>• SEPTA&lt;br&gt;• Taxi&lt;br&gt;• Car rental service&lt;br&gt;• Uber / Rideshare option</td>
<td>• Uber gift cards&lt;br&gt;• Request a ride for someone else</td>
</tr>
</tbody>
</table>
Ground Transportation

Uber Gift Cards for Incoming Guests and Program Attendees

• Gift cards can be purchased at [www.uber.com/giftcards](http://www.uber.com/giftcards)
• Gift cards can be purchased in amounts up to $500
  • The minimum online purchase for gift cards is $10
• Gift cards can be used for UberEATs
• Gift cards are not refundable, transferrable, returnable or redeemable for cash
Julianne: Ground Transportation

Uber Gift Cards

Give the gift of Uber
Customize your eGift Card

1. Choose a design

2. Write a note to go with your gift card

3. Select an amount to give

What you see

What they see

Here's your $5 gift from Andrew

Gift Code

How to use your gift

1. If you're new to Uber, sign up using the button below, and download the app
2. Go to the Payment section of the app and tap Add Promo/Gift Code
3. Enter Gift Code above

This gift card is subject to terms & conditions.
Request a ride for someone else

How it works:
• Choose their location
  • Tap “Where to?” and enter the **pickup location** of the person you’d like to give a ride
• Tell us who’s riding
  • The app will sense you’re requesting for someone in another location—confirm and add their name
• Follow along
  • Your rider will get a text with the driver’s details, and you’ll be able to watch the trip in real time
Julianne: Ground Transportation

Request a ride for someone else

What you see

What they see
QUESTIONS?