

MEMORANDUM

To: Chancellor Ortiz, Peralta Community College District

From: Maeve Katherine Bergman, Berkeley City College

Date: 27 October 2014

Re: Explanation of Out-of-State Travel Submission Delay-GRANT FUNDED TRAVEL

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Dear Chancellor Ortiz,

Please find attached travel forms proposing my attendance on behalf of BCC at the Council for Resource Development 2014 Conference in Washington, CD from 11/5-11/014.

The conference is an opportunity for colleges to develop private and federal resources, including those from foundations and the Department of Education. Especially exciting is information on compliance after significant changes to federal grant management policy and procedure.

Sadly, I learned of the conference only last week from BCC's Title III grant evaluator as she advised me on preparation of our federal applications for funding in spring 2014.

Thankfully, BCC's California Community College Linked Learning Initiative grant funds were available to cover the cost of attendance to this important conference.

Upon review of the proposal, would you be so kind to consider approving my travel?

Thank you in advance for your time and consideration. Please do not hesitate to contact me with any questions or concerns, 510-981-5014 or [mbergman@peralta.edu](mailto:mbergman@peralta.edu).

OCT 29 2014



**Peralta Community College District**  
333 East 8th St., Oakland, CA 94606

OCT 29 2014

**TRAVEL REQUEST AND EXPENSE CLAIM**

**Part 1: Travel Request** (Complete and submit before attending conference.)  
Please type or print and ensure all information is provided as omissions can delay processing.

<b>Employee Name</b> Maeve K. Bergman	<b>Job Title</b> Director of Special Projects	<b>Office / Department</b> Office of Instruction/Special Projects	<b>Location</b> BCC	<b>Day Phone Number</b> 510-981-5014
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**Conference or other Travel Name** (Attach conference announcement, brochure, or other descriptive document.)  
Council for Resource Development 2014 Conference <http://www.crdnet.org/content.asp?contentid=143>

<b>City</b> Washinton	<b>State</b> DC	<b>Conference (Working) Dates</b> (Used to compute per diem days)	<b>Opening</b> 11/6/2014	<b>Closing</b> 11/8/2014	<b>Travel Dates</b> (See instructions tab)	<b>Depart</b> 11/5/2014	<b>Return</b> 11/9/2014
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**Purpose:** Access to, and training in, private and public resource development for Berkeley City College.

**Estimated Expenses**

Identify all anticipated expenses for this conference. Claim may be less than, but cannot exceed requested amount.  
 • Total lodging, meals & incidentals cannot exceed the total per diem rate for the destination times the number of working days. Incidentals cannot exceed \$25/day and do not require receipts. Exception: Lodging can be higher if sponsor's lowest hotel discounted rate is higher. See instructions for additional details and restrictions.  
 • Per Diem Amount requested must be equal or less than maximum.  
 • Use "Google Maps" to determine mileage. Personal vehicle travel cannot exceed economy airfare.

Section A. Daily Per Diem Limits (Maximum Expenses Per Day)	Section B. Total \$ Each Day X Per Diem Days				
	Lodging	Meals & Incidentals	Total \$ (Per Day)	Per Diem Days	\$ Each Day X Per Diem Days (Maximum Permitted)
See Per Diem Rates Tab for amount to enter	\$219	\$71	\$290	3	\$870

**Section C. Total Requested Expenditures for Conference**

Category	Maximum Permitted	Amount Requested	Registration	Lodging Taxes	Travel (Air/Train)	Mileage	Car/Taxi/ Shuttle	Parking / Tolls	Total Request
Per Diem	\$744	\$744							\$744
Non- Per Diem			\$1,020	\$930	\$639		\$39		\$2,628
<b>Total (Not to Exceed Amount):</b>									<b>\$3,372</b>

**Funding**

Source	Coding	Loc	Fund	Cost Center	Object	Program	Activity Suffix	Proj	Line	Cost Center Manager Approval / Date	Amount
Registration		8	11	854	5205	1	602000	1021	00	<i>[Signature]</i>	\$1,020
Non-Local		8	11	854	5202	1	602000	1021	00	<i>[Signature]</i>	\$2,352
Local					5203						
Membership					5301						

**Advance Payment Request**

• Must be submitted with designated approvals 15 working days prior to event.  
 • Advance payments are limited to registration plus 80% of the employee's remaining expenses.

Category	Payee on Check	Requisition Number	Amount
Registration	Council for Resource Development (Registrant ID No. 3336205)	2000087986	1,020.00
	Employee: Maeve Katherine Bergman	2000087989	1,881.55

**Signatures and Approvals**

<i>[Signature]</i> Employee / Date 10/27/14	<i>[Signature]</i> Supervisor / Date	<i>[Signature]</i> President's Signature / Date
<i>[Signature]</i> Business Officer / Date 10/29/14	<i>[Signature]</i> Change / Date 10.29.14	Out of State Travel: Board of Trustees Approval Date



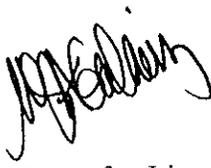
## MERRITT COLLEGE Office of the President



October 30, 2014

### MEMORANDUM

**TO:** Chancellor José Ortiz

**FROM:** President Norma Ambriz-Galaviz 

**SUBJECT:** Late Submission of Travel Request Form for Linnea Willis

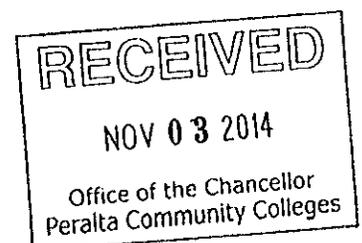
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This memo is to explain the late submission of the Travel Request Form for Linnea Willis submitted to my office on October 27, 2014, which is an out of state travel and requires approval by the Board of Trustees.

The Travel request is to attend the American Association for Paralegal Educators National Conference. During the conference, Ms. Willis will learn teaching techniques, technology and tips directly for Paralegal professors. In addition, as we are in the process of seeking Accreditation from the American Bar Association (ABA), it is vital for her to attend this conference to meet directly with ABA officials who assist with the application process. It is a very important conference to meet with other Paralegal Educators throughout the country and obtain invaluable resources. The information for the conference is available at this link: [http://aafpe.org/Conferences/documents/2014RegBrochNEVADA\\_V10.pdf](http://aafpe.org/Conferences/documents/2014RegBrochNEVADA_V10.pdf).

Ms. Willis encountered several delays at the campus related to the VTEA budget being loaded, budget transfers that had to occur, and approval of the Dean over the use of VTEA funds. Your approval for Ms. Willis to attend the American Association for Paralegal Educators National Conference will be gratefully appreciated.

NAG:jpb





**Peralta Community College District**  
333 East 8th St., Oakland, CA 94606

**RECEIVED**

NOV 03 2014

**TRAVEL REQUEST AND EXPENSE CLAIM**

**Part 1: Travel Request** (Complete and submit before attending conference) Office of the Chancellor  
Please type or print and ensure all information is provided as omissions can delay processing Peralta Community College

Employee Name	Job Title	Office / Department	Location	Day Phone Number
Linnea N. Willis	Head	Paralegal Studies Department	Merritt College	510-589-0207

Conference or other Travel Name (Attach conference announcement, brochure, or other descriptive document.)  
American Association for Paralegal Educators (AAFPE) Annual Conference

City	State	Conference (Working) Dates (Used to compute per diem days)	Opening	Closing	Travel Dates (See instructions tab)	Depart	Return
Summerlin	NV		11/5/2014	11/8/2014		11/5/2014	11/9/2014

Purpose: To meet with American Bar Association (ABA) staff to get tips for completing ABA Accreditation package/application/exhibits and to obtain up to date teaching techniques, data and information for Paralegal classes.

**Estimated Expenses**  
Identify all anticipated expenses for this conference. Claim may be less than, but cannot exceed requested amount.  
• Total lodging, meals & incidentals cannot exceed the total per diem rate for the destination times the number of working days. Incidentals cannot exceed \$25/day and do not require receipts. Exception: Lodging can be higher if sponsor's lowest hotel discounted rate is higher. See instructions for additional details and restrictions.  
• Per Diem Amount requested must be equal or less than maximum.  
• Use "Google Maps" to determine mileage. Personal vehicle travel cannot exceed economy airfare.

Section A. Daily Per Diem Limits (Maximum Expenses Per Day)			Section B. Total \$ Each Day X Per Diem Days		
Lodging	Meals & Incidentals	Total \$ (Per Day)	Per Diem Days	\$ Each Day X Per Diem Days (Maximum Permitted)	
See Per Diem Rates Tab for amount to enter	\$169	\$71	\$240	4	\$960

Section C. Total Requested Expenditures for Conference									
Category	Maximum Permitted	Amount Requested	Registration	Lodging Taxes	Travel (Air/Train)	Mileage	Car/Taxi/ Shuttle	Parking / Tolls	Total Request
Per Diem	\$960	\$800							\$800
Non-Per Diem			\$525	\$61	\$450	\$20	\$200	\$80	\$1,336
<b>Total (Not to Exceed Amount):</b>									<b>\$2,136</b>

Funding										
Source	Coding	Loc	Fund	Cost Center	Object	Program	Activity Suffix	Proj	Line	Cost Center Manager Approval / Date
	Registration	6	11	653	5205	1	140200	1051	01	
	Non-Local	6	11	653	5202	1	140200	1051	01	
	Local				5203					
	Membership				5301					

**Advance Payment Request**  
• Must be submitted with designated approvals 15 working days prior to event.  
• Advance payments are limited to registration plus 80% of the employee's remaining expenses.

Category	Payee on Check	Requisition Number	Amount
Registration	Linnea N. Willis		525.00
Employee	Linnea N. Willis		1,288.80

**Signatures and Approvals**

Employee / Date	Supervisor / Date	President's Signature / Date
9/30/14 10/20/14	10/27/14	10/27/14
Business Officer / Date	Chair / Date	Out of State Travel: Board of Trustees Approval Date
10/24/14	10/31/14	