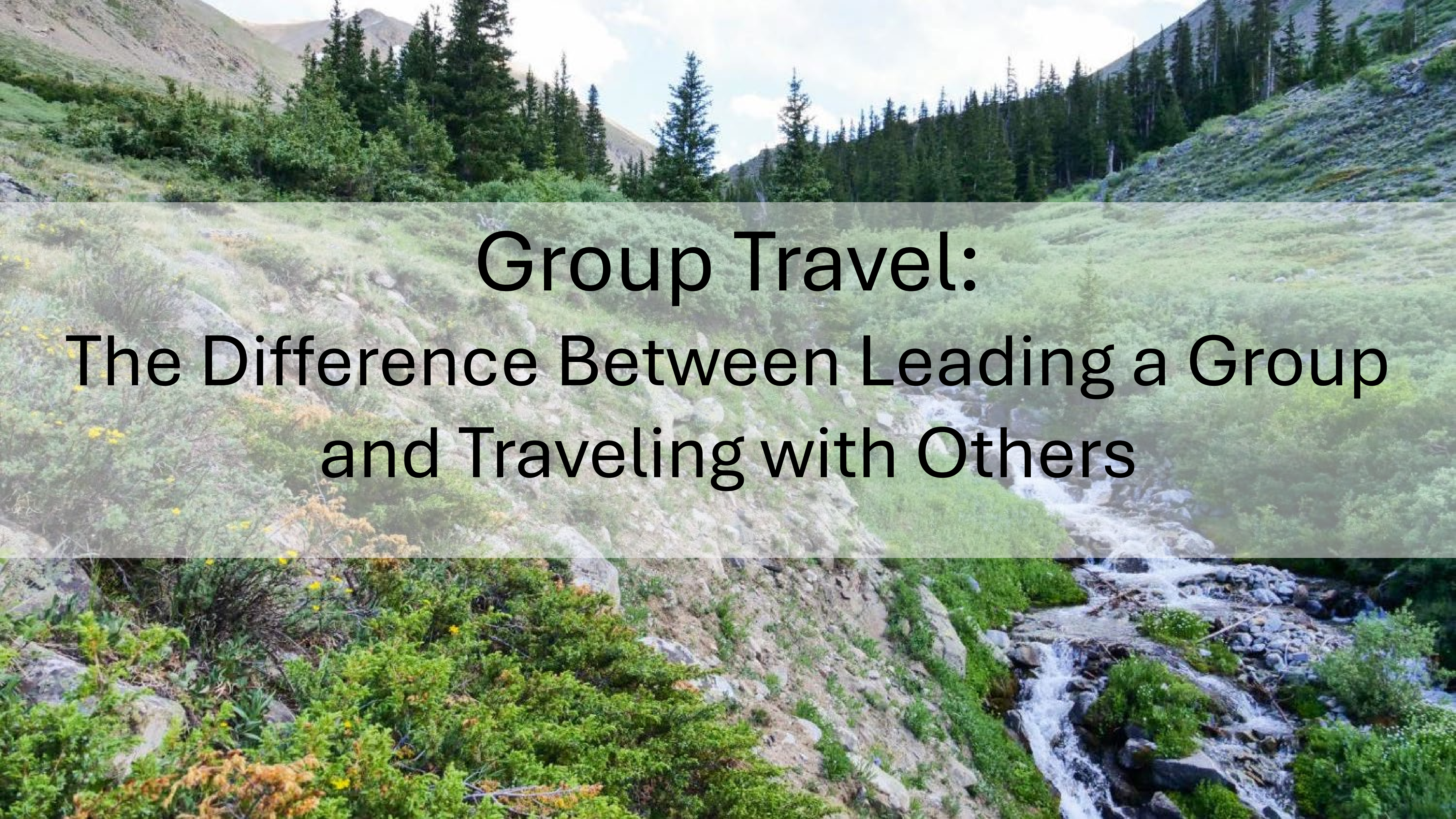

Group Travel:

The Difference Between Leading a Group and Traveling with Others

Introduction: The Travel Team

WHO WE ARE

Shannon Miller: Travel Program Manager

Houa Cha: Travel Program Coordinator

Sophia Lueth: Director of Travel and Payment Services

Contact us: PSCtravel@cu.edu

WHAT WE DO

- Vendor and supplier management
- Policy development and compliance
- Expense management and reporting
- Customer advocacy

GROUP TRAVEL
VS.
TRAVELING TOGETHER

What CU means by “group travel” and why it matters for booking, approvals, and expenses

The Key Distinction

“Group Travel” is not simply several people on the same trip.

COHESIVE UNIT

Same official university business, same destination, recognized as a cohesive unit representing the university, with travel expenses coordinated or paid by one individual responsible for leading the group. Typically comprised of one or two employees leading a group of non-employee students or guest travelers.

Three university employees attending the same conference would typically be considered individual travelers.

What makes a group a "cohesive group"?

The policy definition starts with the number of travelers – but the cohesive-unit test is what matters.

3+

Employees and non-employees

traveling to the same location for the same official university business

Important:

Attending the "same conference" or "same flight" is not evidence of a cohesive group.

Think "one organized university unit" rather than "several people with matching itineraries."

COHESIVE UNIT TEST

1. **Common business purpose** — They are traveling to accomplish the same official university objective – not merely attending the same event.
2. **Identifiable unit** — They function as a recognizable team, class, delegation, research group, or other organized unit.
3. **Shared representation** — They are participating together as a unit representing the university.
4. **Coordinated travel needs** — Their travel and expenses are managed around the group's shared activity, rather than simply coordinated for convenience.

The easiest way to spot the difference

Start with the people and the business purpose – not the itinerary.

FORMAL GROUP TRAVEL

The travelers operate as one unit.

- Same official business purpose
- Recognizable team / delegation / class / group
- Travel is coordinated around the group activity
- Group-related arrangements may be handled together

Examples: intercollegiate teams, study-abroad groups, organized delegations.

INDIVIDUAL TRAVELERS

The travelers own separate trips.

- May share the same destination or event
- Each has their own business purpose or responsibility
- May coordinate flights simply for convenience
- Each traveler generally manages their own trip

Examples: several faculty/staff at the same conference; colleagues traveling together to a meeting; employees on the same flight for convenience or based on availability.

Traveling together is a logistics choice or happenstance. Group travel is a policy classification.

Same destination, different treatment

These examples show why “they are traveling together” is not enough.

01 GROUP

Basketball team travels to an NCAA event

Athletes and staff travel as a cohesive unit representing CU for the same official business purpose.

02 GROUP

Four employees and six non-employee guests travel to an international research project

The employees and non-employees travel together as a coordinated research group for the same official university business purpose where expense will be covered by the university, **managed** by a Group Leader.

03 INDIVIDUAL

Eight employees coordinate the same flights to/from an out of state conference

They knowingly travel together but are not functioning as one organized university unit.

04 GROUP

A class travels together for a field experience off campus

Students and faculty are participating as an organized university group with one shared educational purpose.

Ask: “Would I describe these travelers as one organized university group?”

Pre-Approval: One Group Activity, Two Paths

Employees and non-employees can participate in the same cohesive group, but their travel approvals are handled differently.

SAME GROUP ACTIVITY

EMPLOYEES

Pre-approval is required before booking.

DOMESTIC — Concur Request is recommended, but the department may use its own internal pre-approval process.

INTERNATIONAL — Concur Request is required and must be fully approved before the trip is booked.

Approval follows the employee's normal travel approval workflow.

NON-EMPLOYEES

The sponsoring department manages the approval outside Concur.

BEFORE BOOKING — Obtain written departmental approval that documents the business purpose of the trip.

BOOKING — Provide the written approval to CBT when an agent books the trip.

Key point: Group travel status does not create one shared approval process for every traveler.

How expenses are paid

The payment method follows the travel model.

GROUP TRAVEL

1. **Airfare**
   Book through Concur or CBT for the group.
2. **Shared expenses**
   Use the Group Leader's Travel Card whenever possible.
3. **Cash needs**
   Use a Cash Advance for allowable per diem and out-of-pocket costs that cannot be paid by the Travel Card.
4. **Reconciliation**
   Group-related expenses reconciled by Group Leader on a single expense report.

INDIVIDUALS TRAVELING TOGETHER

1. **Airfare**
   Each traveler books through Concur or CBT.
2. **Travel expenses**
   Each traveler uses their own Travel Card for expenses incurred.
3. **Per diem**
   Each traveler claims their allowable per diem on their own travel expense report.
4. **Reconciliation**
   Each traveler reconciles their own travel expenses.

Key point: Group Travel centralizes payment and reconciliation where practical; traveling together does not.

Reimbursement: One Group Event, Two Possible Models

The reimbursement approach follows the travel classification – not simply the fact that people traveled together.

SAME TRIP / SAME ACTIVITY

GROUP EVENT

One cohesive group with a designated university Group Leader

GROUP COSTS	Identify the allowable expenses incurred for the trip for the group as a whole.
GROUP LEADER	A designated group leader may coordinate and reconcile shared group expenses.
SHARED PURCHASES	Examples may include eligible lodging, group transportation, and group meals.
CASH ADVANCE	When appropriate, a cash advance may support allowable on-the-ground expenses for attendees.

INDIVIDUAL TRAVELERS

Several employees traveling to the same destination

INDIVIDUAL REPORTS	Each traveler reconciles their own allowable travel expenses.
SEPARATE COSTS	Each report includes that traveler's airfare, lodging, meals, transportation.
COORDINATION ≠ CONSOLIDATION	Travelers may coordinate logistics without creating one shared expense report.
OWN EXPENSES	Travelers generally reconcile their own expenses.

KEY POINT: A group event can have group-level expenses and a designated group leader. People who simply happen to travel together reconcile separately.

Group Travel Decision Tree

Use the group purpose, who is traveling, and who is responsible for the expenses.

Are 3+ people traveling to the same location for the same official university business?
Start with the business purpose and destination.

NO → **Individual travel**

YES ↓

Are they a cohesive group?
They share the same official objective and operate as one organized university unit.

NO → **Individual travel**

YES ↓

Is there a designated employee Group Leader?
One person is accountable for coordinating and managing the group's travel expenses.

NO → **Individual travel**

YES ↓

Will the Group Leader manage the group's shared expenses?
Airfare follows the CU Travel Program; group-related lodging, ground transportation, meals, and other shared costs are paid by the Group Leader when possible.

YES ↓

GROUP **Group Travel**

A cohesive university group with one designated employee Group Leader responsible for coordinating and managing group expenses.

NO ↓

INDIVIDUAL **Individual Travel**

Travelers may coordinate flights or destinations, but each traveler owns their trip and manages their own expenses.

Important

Individual incidental expenses can still exist within Group Travel, such as mileage or airport parking that cannot reasonably be paid by the Group Leader.

Core test: one organized university group + one designated Group Leader responsible for the group's travel expenses.

Group Travel Q & A

QUESTION

Does Group Travel require one expense report covering every expense for every traveler?

ANSWER

In general, one expense report is submitted by the Group Leader to capture expenses incurred on behalf of the group. However, certain individual incidental expenses, such as mileage or airport parking, that cannot reasonably be paid by the Group Leader may be submitted separately on a Non-Employee Expense Report (or separate Employee reports if appropriate). These individual expenses do not change the trip from Group Travel to individual travel.

KEY POINT The group remains Group Travel when the travelers are still functioning as a cohesive group; the separate report is simply for an individual incidental expenses.

QUESTION

How should the Group Leader calculate a Cash Advance when students will receive cash per diem?

ANSWER

Calculate the advance based on the actual allowable per diem expected to be distributed to the students, not simply the full daily rate multiplied by the number of travelers and days. Start with the applicable per diem for each travel day, including the reduced first and last travel days, then deduct any meals provided by the conference/event or paid directly by the Group Leader (Group Meals). The remaining allowable meal amounts to be provided to students in cash make up the per diem portion of the Cash Advance.

KEY POINT Allowable daily per diem – provided/group-paid meals = cash per diem needed for that traveler.

Group Travel Q & A

QUESTION

Is there a written guide for calculating Group Travel per diem Cash Advances?

ANSWER

We do not currently have a written guide specifically for calculating Group Travel per diem for Cash Advances because the calculation depends on the specific travel event and how meals and per diem will be handled. The department or Group Leader should use the methodology described on the prior slide and document the calculation in a spreadsheet or similar worksheet. That calculation should be attached to the Cash Advance request to support the amount being requested.

KEY POINT Use the travel event details to build the calculation and attach the supporting worksheet to the Cash Advance Request.

QUESTION

How does the faculty/staff member pay when a portion of the trip is funded through student fees?

ANSWER

The source of funding does not change the appropriate method of payment. The traveler would continue to use the CU Travel Program and their Travel Card as appropriate. During reconciliation, the department can allocate the applicable expenses to the appropriate SpeedType or funding source, including the portion supported by student fees. The traveler should work with their department or appropriate campus finance team to ensure any expenses including those for travel are allowable on the funding source used.

Group Travel Q & A

QUESTION

Who should be included in the approval process for faculty/staff-led travel funded by student fees?

ANSWER

Questions regarding approvals required for specific funding sources should be directed to your department's finance team or to your campus Controller's office. Any required approval based on funding source should be incorporated by the employee/traveler into the reconciliation process.

Appendix

Related policies

- PSC Procedural Statement: Travel
- PSC Procedural Statement: Cash Advance
- PSC Procedural Statement: Sensitive Expenses
  - APS 4015 Propriety of Expenses
- PSC Procedural Statement: Business Expense Reimbursement

Other helpful resources

- PSC Online Training
- Group Travel
- University Risk Management International Travel Resource