



McGill

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TRAVEL REGULATION

The following Travel Regulation has been approved and issued under the authority of the McGill University Procurement Policy.

OVERVIEW:

McGill University's Travel Regulation must be adhered to and applied by all University academic staff, administrative and support staff and students travelling in support of the University's activities and incurring travel related expenses on behalf of the University (hereinafter collectively referred to as "the Traveler"). University activities are defined as any work carried out by the Traveler in support of the University's mission.

The University's travel and other allowable business expenses from all sources of funding being administered by McGill University shall follow these Regulations. Where applicable, Granting Agency guidelines supersede the University Regulation.

As a publicly funded institution, the University must endeavor to use its resources efficiently and effectively. Due care and judgment must be exercised when incurring or approving expenses.

The Travel Regulation is an integral part of McGill University's Procurement Policy. Refer to the Travel Procedures for details regarding the implementation and interpretation of the following Regulation.

Part I. TRAVEL REGULATION (TR)

1. GENERAL:

- TR1.1 The University strives to provide the Traveler with safe and reliable travel services while supporting the University's cost containment objectives and in compliance with the Act Respecting Contracting by Public Bodies (Act C-65.1). Funds must be used effectively and economically. The Traveler is expected to apply good judgment at all times and ensure expenses are reasonable, appropriately documented and comply with this Regulation.
- TR1.2 The Traveler is responsible for assuming all personal travel expenses as well as those of any family member or other person who accompanies the Traveler on such trips.
- TR1.3 All possible conferencing mechanisms should be considered as an alternative to travel.
- TR1.4 Any violation of this Regulation may result in sanctions applied in a manner consistent with the University's applicable Human Resource policies, up to and including termination of employment.

2. TRAVEL AUTHORIZATION

- TR2.1 The Traveler should obtain authorization from the Fund Financial Manager (FFM), whose funds will be charged for the respective travel expenses, prior to making any travel arrangements. Where the Traveler has a personal relationship with the FFM (i.e. spouse, sibling, children), such authorization should be directed to the immediate superior of the FFM.

3. BOOKING TRAVEL ARRANGEMENTS

- TR3.1 The Traveler must use the University's contracted Travel Management Company (TMC) or the selected online booking tool (the "OBT") to make reservations for air transportation related to administrative purposes, including the air transportation for job candidates.
- Exception:** Regardless of the source of funds, travel by academic staff, including librarians, for academic research and teaching purposes is not subject to TR3.1 This exemption extends to travel arrangements for academics, including students, visiting the University (other than those coming job candidates).

4. COMBINING UNIVERSITY TRAVEL WITH PERSONAL TRAVEL

- TR4.1 Airfare that includes costs which are not a necessary consequence of travel on behalf of the University (e.g. avoidable stopovers and trip extensions) is considered personal. The Traveler is responsible for obtaining and attaching to the Expense Report one airfare quotation for the itinerary purely related to University activities (i.e. that excludes avoidable stopovers and trip extensions). The Traveler will be reimbursed the lowest airfare.

5. TRANSPORTATION

- TR5.1 The Traveler is expected to travel by the most cost effective and sustainable method of transportation.
- TR5.2 **Air Travel**
The Traveler shall choose the lowest logical airfare for the itinerary considering all elements of the routing and consistent with the requirements of the University activities. The lowest logical airfare is defined as the most economical class of air travel over the most efficient route taking into consideration specific travel requirements.
Note: Seats in a fare class greater than the highest economy class are only permitted for flights outside of North America and require the prior approval of the Traveler's Dean or Vice-Principal/Provost.
- TR5.3 **Rail Travel**
The University encourages usage of rail travel whenever practical. The Traveler is authorized to use any class of rail for any route provided the cost of the rail option does not exceed lowest logical airfare to the same destination.

TR5.4 Rental Vehicles

The University's car rental standard is the compact to mid-size vehicle. Selection of the vehicle and duration of the rental must correspond to the requirements of the University related activity. It is the responsibility of the Traveler to ensure that appropriate driver licenses and adequate insurances (as per Travel Procedures) are in effect for the duration of the rental period.

TR5.5 Other Ground Transportation

Bus/Coach Services

The University encourages usage of bus services, whenever practical.

Personal Car Usage

The Traveler may use their personal vehicles for University related activities provided there is no suitable and/or economical public transportation available. It is the responsibility of the traveler to ensure there is appropriate and adequate insurance (as per Travel Procedures) for the use of their personal vehicle for University related activities.

Other Transportation

Reasonable use of taxi and public transportation to and from airports, railway stations, hotel locations and meeting places are authorized.

6. ACCOMMODATION

TR6.1 The Traveler shall obtain accommodations in a reasonable quality hotel. For Guidelines refer to Accommodation Directory Government of Canada, Public Works and Government Services Canada.

7. TRAVEL PLAN CHANGES OR CANCELLATIONS

TR7.1 Travel changes and/or cancellations are costly and will only be reimbursed for valid and unforeseen circumstances.

TR7.2 To avoid unnecessary change fees and cancellation penalties, the travel arrangement should only be confirmed once the Traveler is certain of the trip itinerary.

TR7.3 Changes and/or cancellations must be communicated to the TMC as soon as known by the Traveler.

8. VOICE AND DATA COMMUNICATION

TR8.1 Calling cards and business cellular phones with pre-arranged data packages shall be used to avoid incurring excessive voice and data communication surcharges.

TR8.2 Free WIFI, where available, shall be used for accessing the internet.

9. MITIGATING TRAVEL RISKS

TR9.1 All travel plans involving any category of students must be made in accordance with the University's International Mobility Guidelines for *<UNIVERSITY-RELATED INTERNATIONAL TRAVEL ACTIVITY BY STUDENTS AND UNIVERSITY STAFF ACCOMPANYING THEM>*.

TR9.2 The Traveler is expected to undertake the necessary actions in advance of commencing travel to ensure highest level of safety and security during the trip and to mitigate any potential risks associated with the trip.

TR9.3 The Traveler must follow the appropriate approval, insurance, travel security and other related requirements. The Traveler is responsible to ensure that certain provisions are met in advance of a trip.

These provisions may include but are not limited to:

- 9.3.1 Obtaining adequate insurance coverage. The Traveler is responsible to have sufficient insurance, valid for the duration of the trip. Insurances may include but not limited to: emergency travel medical insurance, emergency evacuation coverage and rental vehicle related insurance
- 9.3.2 Registering with McGill by completing Business Travel Form on Human Resources website
- 9.3.3 Registering with Foreign Affairs and Trade Development (if travelling outside of Canada)
- 9.3.4 Providing the Traveler's direct superior with a detailed travel itinerary and subsequent updates
- 9.3.5 Ensuring that all travel documents including visa and immunizations are up-to-date and valid for the itinerary in question

10. LOYALTY PROGRAM POINTS

- TR10.1 The Traveler may retain for personal use any loyalty program points (i.e. frequent flyer points offered by airlines) accumulated as a result of University travel.
- TR10.2 The University will not reimburse the Traveler for purchases made with loyalty program points. However, if points are being redeemed for University related travel the applicable fees and taxes will be reimbursed, provided the cost does not exceed lowest logical airfare.
- TR10.3 Any fees or related costs of loyalty programs will not be reimbursed.
- TR10.4 Traveler is personally responsible to report, as part of their annual income tax return, any loyalty program points that have been redeemed.

Cross - References:

- i) McGill Human Resource Guidelines: Labor Relations | Personnel Policies and Procedures | Administrative Dismissals
- ii) McGill Guidelines for Student travel: University Secretariat, University Policies, Procedures and Guidelines, Students, Other Documents Relevant to Students, International Mobility Guidelines
- iii) McGill Emergency Travel Assistance (under Supplemental Health Plan): Human Resources | Benefits | Emergency Travel Assistance
- iv) McGill Travel Procedures: Travel Services website | Procedures
- v) Government of Canada Accommodation Directory
- vi) Canadian Department of Foreign Affairs and Trade Development (DFATD) for international travel advisories
- vii) Canada Revenue Agency | Benefits and allowances | Loyalty and other points programs for information on frequent flyer points and taxable benefits