

The Pierre Elliott Trudeau Foundation 2015 Fellowship Spending Guidelines

Introduction

Every year, the Pierre Elliott Trudeau Foundation recognizes fellows who have set themselves apart through their intellectual achievements, their creativity, and their social commitment to one or more of the Foundation's four themes. By joining the Foundation, Trudeau fellows join a growing community of researchers and creators involved in an impressive array of fields. They take regular part in a variety of events organized by the Foundation to disseminate their work and learn about the work of others, and they share ideas with experts in the country and around the world.

Trudeau fellows are selected in part on the basis of their Trudeau project proposal: an initiative grounded in one or more the Foundation's four themes, that addresses an important public policy problem and engages the Foundation's community of mentors, fellows, and scholars.

Use and tenability of the Trudeau fellowship research grant

The Foundation expects fellows to spend the Trudeau fellowship research grant effectively and economically. All expenses must be essential to the fellow's intellectual pursuits, creativity, and social commitment, as related to the stipulations of the Memorandum of Agreement signed by the fellow, the fellow's university, and the Foundation.

The research grant funds are tenable for a maximum of four (4) years. Unused funds may be transferred to the next fiscal year during the first three years. At the end of the fourth year, all unused funds must be returned to the Foundation.

Spending guidelines

The following guidelines are designed to orient Trudeau fellows in their use of their research grant. These guidelines provide a framework for the management of this grant and help the fellows and university administrators establish fair, reasonable, and transparent practices. With the written permission of the Foundation, and upon submission of justification by the fellow, transfers from one category to another are possible.

Professional Support Expenses **Up to \$80,000 per fellowship**

Persons paid from the research grant are not considered Foundation employees, scholars, fellows, mentors or program beneficiaries and cannot be identified as such.

Eligible professional support expenses

- Salaries, stipends, and related federal, provincial and institutional non-discretionary benefits for research-related work performed by personnel (e.g., students, research associates, technicians). The rates of pay for personnel must conform to the salary scale of the institution concerned

- A maximum salary/stipend of \$10,000 per annum for doctoral or postdoctoral fellows from the research grant. The doctoral or postdoctoral research must be related to the objectives of the fellow's Trudeau project. Unless approved beforehand, salaries to doctoral or postdoctoral fellows are limited to two (2) years' support from fellowship funds
- Consulting fees if approved by the Foundation
- Fees paid to research subjects, such as modest incentives for participation, where ethically acceptable
- Subcontracting costs, including the cost of course buy-outs, subject to approval by the Foundation
- Costs involved in the preparation of teaching materials
- Clerical salaries directly related to dissemination activities, including manuscript preparation

Non-eligible expenses (list not exhaustive)

- Discretionary severance and separation packages

Travel and Participation Costs Up to \$40,000 per fellowship

The Foundation retains the sum of \$25,000 from each research grant in a travel and participation envelope that covers the cost of the fellow's travel to and participation in events organized by the Foundation. Unlike the rest of the grant, the travel and participation envelope held at the Foundation does not expire at the end of four years. Rather, it is reserved for the fellow's use until it has been exhausted.

The Foundation authorizes the fellow to allocate an additional \$15,000 of his or her research grant to travels across the country and around the world for the purposes of research, learning, dissemination of ideas, and networking. Upon request and subject to the Foundation's approval, it is possible to allocate part of this envelope to the travel costs of an assistant working on the fellow's Trudeau project.

Whether travelling to Foundation events or not, when using the research grant to travel, the fellow is subject to the Foundation's travel policy, which can be consulted at fondationtrudeau.ca/en/trudeau-foundation/publications/policies.

Electronic and Technical Supplies Up to \$7,500 per fellowship

Purchases of supplies, equipment, computer equipment and electronic communications materials must be made during **the first 24 months** of the fellowship and must be for the fellow's individual use. Purchases should directly contribute to the fellow's research accomplished during his or her Trudeau fellowship.

Eligible expenses

- Research and laboratory equipment and supplies related to the needs of the fellowship.
- Transportation costs for purchased equipment, including brokerage and customs charges for the importation of equipment and supplies.
- Maintenance and operating costs of equipment in direct relation to the fellowship.

- Computers, modems, and other hardware and software required for the fellow's individual use as a Trudeau fellow.
- Electronic communication devices when necessary for data collection, with adequate justification.

Non-eligible expenses (list not exhaustive)

- Purchases made after the first 24 months of the fellowship, unless authorized by the Foundation in advance.
- Insurance costs for equipment, research vehicles.
- Costs of the construction, renovation or rental of laboratories or supporting facilities.
- Standard monthly connection or rental costs of telephones.
- Connection or installation of lines (telephone or other links).
- Library acquisitions, computer and other information services provided to all members of an institution.
- The rental or purchase of cellular phone or personal digital assistants, including service plans, long distance or local charges, and voice mail, unless necessary for data collection and authorized by the Foundation in advance.

Knowledge Dissemination Costs Up to \$80,000 per fellowship

The Foundation encourages the organization of networking events and knowledge dissemination efforts, including the use of new media to further knowledge exchange.

Eligible expenses

- Costs of organizing networking events and conferences in direct relation with the objectives of the fellowship, including reasonable honoraria for invited conference speakers and hospitality, travel, and networking expenses. All hospitality and travel expenses must conform to the Foundation's Travel Policy.
- Costs of holding a workshop or seminar directly related to the objectives of the fellowship, including reasonable hospitality expenses.
- Costs of developing web-based information, including website maintenance fees.
- Costs associated with the dissemination of findings, i.e., through traditional venues as well as videos, DVDs, etc.
- Dissemination of research results, such as translation, not in excess of \$10,000.
- Page charges for articles published, including costs associated with ensuring open access to the findings (e.g., costs of publishing in an open access journal or making a journal article open access).
- Costs of preparing a research manuscript for publication.
- Costs associated with the publication of books with a maximum of \$10,000 per publication and per year.
- Media training.

Salary Support for Visiting Fellows Up to \$50,000 per year

Upon approval by the Foundation, a visiting fellow may receive no more than \$50,000 per year in salary support. The total amount of salary support to be paid over the life of the fellowship funds must be determined at the beginning of the fellowship period.

Miscellaneous Expenses**Up to \$20,000 per fellowship**

The effective, reasonable and economic use of the research grant applies here as for all other expenses necessary for the objectives of the fellowship.

Eligible expenses

- Costs for the purchase of books or periodicals, specialized supplies, and any necessary information services not provided by the fellow's institution to its academic and research staff.
- Costs related to professional training or development, such as computer and language training in research-related languages.
- Costs of membership in professional associations or scientific societies.

Non-eligible expenses (list not exhaustive)

- Costs of entertainment, hospitality and gifts, other than those specified above, such as regular interactions with colleagues and personnel meetings.
- Costs related to staff awards and recognition.
- Costs of basic services such as heat, light, water, compressed air, distilled water, vacuums, and janitorial services supplied to all laboratories in a research facility.
- Insurance costs for buildings or equipment.
- Costs associated with regulatory compliance, including ethical review, biohazard or radiation safety, environmental assessments, or provincial or municipal regulations and by-laws.
- Monthly parking fees for vehicles, unless specifically required for fieldwork.
- Sales taxes to which an exemption or rebate applies.
- Costs of home rentals, unless necessary for networking or fieldwork.
- Costs of clothing.
- Patenting expenses.
- Costs of moving a lab.

University Administration Expenses**Up to \$22,500 per fellowship**

As stipulated in the Memorandum of Agreement signed by the fellow, the fellow's university, and the Foundation, each year the fellow's university is permitted to charge the fellowship for administration costs not exceeding 15% of the fellowship amount received in that year. The university has the discretion to charge less than 15% or to waive administration charges entirely.