



The Pierre Elliott Trudeau Foundation Trudeau Foundation Fellowship User Guidelines 2014-2015

Introduction

The Trudeau fellowship is given in recognition of career contributions of international pre-eminence as well as academic and professional excellence. The fellowship is not a research grant – rather, it recognizes individuals who have set themselves apart through their research activities, their creativity, and their social commitment. Each Trudeau fellowship has a total value of \$225,000, comprised of a \$50,000 award paid directly to the fellow, a \$25,000 travel and participation allowance administered by the Foundation, and a \$150,000 research and public engagement allowance administered by the fellow's university. Trudeau fellows enjoy extensive freedom in their use of these funds.

In addition to its monetary value, the Trudeau fellowship comprises membership in the Trudeau Foundation community. By meeting Trudeau fellows, mentors and scholars, Trudeau fellows join a growing community of researchers and creators involved in an impressive diversity of fields. They have access to a variety of public events organized by the Foundation during which they have the opportunity to disseminate the results of their work and share their ideas with the top experts in the country and around the world. Once during the period of the fellowship, the fellows deliver a Trudeau lecture or other public lecture during which they discuss their trajectory, their research, and their role as public intellectuals. This original lecture is published in the *Trudeau Foundation Papers* or another vehicle designated by the Foundation.

The Foundation's expectations of its fellows

1. Participation in Foundation events and exchanges with other Trudeau Foundation community members are an essential aspect of the fellowship. Trudeau fellows are expected to attend all Foundation functions.
2. Visibility is crucial to the Foundation's permanence. For that reason, the Foundation expects its fellow to clearly mention the Trudeau fellowship's contributions to their work and to identify themselves as Trudeau fellows in their publications, articles, op-eds, when receiving awards, and so forth.
3. The Foundation expects fellows to use their research and public engagement allowance effectively and economically. All expenses must be essential to the fellow's research activities, creativity, and social commitment.

Tenability of the fellowship funds

Fellowships 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 and public engagement allowance. These guidelines provide a framework for the management of the fellowship funds and help the fellows and university administrators establish fair, reasonable, and transparent practices. With the written permission of the Foundation, and following a motivated request from the fellow, transfers from one category to another are possible.

Professional Development Expenses Up to \$80,000 per mandate

Persons paid from Trudeau fellowship funds are not considered Foundation employees, scholars, fellows, mentors or program beneficiaries and cannot be identified as such.

Eligible professional development expenses

- Salaries, stipends, and related federal, provincial and institutional non-discretionary benefits for research work performed by research personnel (e.g., students, research associates, technicians, etc.). The rates of pay for research associates, research assistants and technicians must be in accordance with the salary scale of the institution concerned.
- A maximum salary/stipend of \$10,000 per annum for postdoctoral fellows from fellowship funds. The post-doctoral research must be related to the overall perspectives of the fellowship. Salaries to postdoctoral fellows are limited to two (2) years' support from the Foundation fellowship funds.
- Consulting fees.
- Fees paid to research subjects, such as modest incentives for participation, where ethically acceptable.
- Subcontract costs.
- Clerical salaries directly related to dissemination activities, including manuscript preparation.

Non-eligible expenses

- Salaries or stipends for master students and doctoral students.
- Administrative (or management) charges and fees.
- Discretionary severance and separation packages.

Travel and Subsistence Costs

Up to \$40,000 per mandate

The Foundation retains the sum of \$25,000 from each Trudeau fellowship 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 fellowship funds, the travel and participation envelope 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 fellowship to travels across the country and around the world in the name of research, learning, dissemination of ideas, and networking. In this regard, the fellow is subject to the Foundation's travel policy, which can be consulted at fondationtrudeau.ca/en/trudeau-foundation/publications/policies. The travel policy and travel procedures clarify and standardize the procedures related to travel expenses covered by the fellowship. Complementing the travel policy, other types of eligible expenses for Trudeau fellows are listed below.

Other types of eligible travel expenses

- Entry visa fee for fellows when required for the purpose of the fellowship.
- Travel insurance when directly related to the objectives of the fellowship.
- The eligible cost for a nursing mother who is traveling with a caregiver and a child under two years of age is limited to travel and accommodation costs up to a maximum of \$1,000 for the traveling caregiver, in lieu of childcare expenses.

Non-eligible expenses

- Commuting costs for fellows to travel between their residence and their place of employment or between two places of employment.
- Passport and immigration fees.
- Costs associated with thesis examination/defence, including external examiner costs.
- Reimbursement for airfare purchased with personal frequent flyer points programs.

Computers, Electronic Communications, and Supplies Up to \$10,000 per mandate

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. Laboratory equipment unrelated to the individual needs of the fellow is not eligible.

Eligible expenses

- Research equipment and supplies.
- Transportation costs for purchased equipment.
- 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 fellowship recipient.
- Cellular phones and personal digital assistants when necessary for data collection, with adequate justification.

Non-eligible expenses

- Laboratory equipment unrelated to the individual needs of the fellow.
- Purchases made in the last 12 months of the fellowship.
- 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).
- Voice mail.
- 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, unless necessary for data collection.

Knowledge Dissemination

Up to \$80,000 per mandate

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

Eligible expenses

- Organization of networking events and conferences in direct relation with the objectives of the fellowship, including reasonable honoraria for invited conference speakers, hospitality, travel and networking expenses.
- 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, with a maximum of \$10,000 per year.
- 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.

Services and Miscellaneous Expenses

Up to \$20,000 per mandate

The effective, reasonable and economic use of the fellowship applies as for all other expenses.

Eligible expenses

- Costs for the purchase of books or periodicals, specialized office supplies, computing equipment and information services not formally provided by the institution to its academic and research staff.
- Reasonable hospitality costs for networking purposes in direct relation with the objectives of the fellowship.
- Costs involved in the preparation of teaching materials.
- 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 necessary for the objectives of the Fellowship.

Non-eligible expenses

- Costs of entertainment, hospitality and gifts, other than those specified above, such as regular interactions with colleagues from the institution 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 field work.
- Sales taxes to which an exemption or rebate applies.
- Costs of home rentals, unless specifically related to networking or fieldwork.
- Costs of clothing.
- Patenting expenses.
- Costs of moving a lab.

University Administration Expenses

Up to \$22,500 per mandate

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.