

# POLICY

| *Travel and Research Expenses Policy - Scholars*

| Approved by the Executive Committee of the Board of Directors on September 7, 2022

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## 1. CONTEXT

In 2002, the Government of Canada endowed the Pierre Elliott Trudeau Foundation with the Advanced Research in the Humanities and Human Sciences Fund in the amount of \$125 million, to be capitalized in perpetuity as a legacy in honour of the former Prime Minister.

Since its inception, the Foundation has served as a nonpartisan registered charity and the Fund has been dedicated to supporting excellence and leadership in the pursuit of advanced knowledge and ideas.

## 2. INTRODUCTION

This travel and research expense policy (the “**Travel and Research Policy**”) provides the goals, principles, guidelines and procedures used by the Pierre Elliott Trudeau Foundation (the “**Foundation**”) that will ensure efficient reporting, approval and reimbursement of travel, research and networking expenses on Foundation business undertaken by our Scholars (the “**Claimant**”).

This policy may be updated from time to time as required.

## 3. GOALS AND PRINCIPLES

The Foundation’s Travel and Research Policy has the following goals:

- To provide guidance to Claimants on the principles, procedures and requirements governing their travel, research and networking expenses with Foundation resources.
- To ensure the exemplary and accountable management of the Foundation’s resources in relation to its mission, strategic priorities and activities.
- To optimize the use of resources allotted for research, travel and networking that will support the Foundation’s mission and strategic priorities.

The following principles govern the policy:

- Claimants should make fair, transparent, prudent and responsible use of the Foundation’s resources;
- Claimants should take the environmental and social impacts of their travel options into account; and
- Among other considerations, Claimants should consider how their travel option could affect the Foundation’s image and reputation.

## 4. ALLOWABLE EXPENSES

If you require any clarification or confirmation if an expense is an Allowable Expense, please contact the Foundation.

Based on the application of this policy, the Foundation may, at any time, refuse to cover an expense considered ineligible, unjustified or unreasonable. A refusal to comply with this policy or a false statement by a Claimant could provide cause for termination of the scholarship funding agreement between the Claimant and the Foundation.

## 4.1 Research, travel and networking allowance for Scholars

Research, travel and networking allowances for Scholars are also known as the Annual Travel Allowance (the “ATA”).

Scholars have access to an ATA of up to CAD\$20,000 per Reference Year for participation in activities in relation with their annual study plan, and participation in the Foundation’s events. This amount is distributed according to the allocations in section 4.2.

### 4.1.1 Approvals for Reimbursement of Expenses

#### **Information for Scholars:**

For any activity or event that is not organized directly by the Foundation and covered by this Policy, Scholars must first submit a Communication and Knowledge-Sharing Study Plan (“Study Plan”) and a corresponding budget, in the template provided by the Foundation, describing these activities and events to the Foundation. The Foundation will review and approve proposed Study Plans and budgets that are consistent with the Study Plan framework and guidelines, as well as this Policy. In this regard, **any activity proposed in the Study Plan, and corresponding budget must be submitted and approved by the Foundation prior to incurring expenses described in this Policy.**

Requests for reimbursement of expenses incurred for activities carried out in accordance with the approved Study Plans (and, similarly, for the participation of Scholars in events organized by the Foundation) must be submitted with a financial activity report, using the template that will be provided by the Foundation. As a reminder, Scholars must also submit an Annual Report to describe all the activities that they carried out in accordance with their Study Plans, as well as their participation in events organized by the Foundation.

## 4.2 Research, travel, and networking annual travel allowance for Scholars - Allocations

4.2.1 Scholars may use up to \$10,000 of the Annual Travel Allowance per Reference Year towards, as a priority, their participation at conferences or events to disseminate knowledge, as described in the Table of A.1 – *Knowledge-Sharing Conferences and Events* of the Study Plan as follows:

Year 1	
<b>Conference or Event</b>	A public presentation by the Scholar in his or her field of study.  This public presentation must be prepared in collaboration with the Mentor/Fellow paired with the Scholar in relation to gaining access to the event and its network.
<b>Location*</b>	In Canada or Internationally
<b>Sector</b>	In a private, governmental or not-for-profit sector
<b>Conference or Event</b>	A local, national, or international conference on the Scientific Cycle theme.

	The Scholar will attend and take notes during this conference and share them with the rest of the cohort to enrich the reflections on the Scientific Cycle theme and to better prepare for the <i>Impact Conference</i> planned in Year 3.
<b>Location*</b>	In Canada or Internationally
<b>Sector</b>	In a private, governmental, academic or not-for-profit sector
<b>Year 2</b>	
<b>Conference or Event</b>	A public presentation by the Scholar in his or her field of study.  This public presentation must be prepared in collaboration with the Mentor/Fellow paired with the Scholar in relation to gaining access to the event and its network.
<b>Location*</b>	In Canada, if you presented at an international location in Year 1. Internationally, if you presented in Canada in Year 1.
<b>Sector</b>	In a private, governmental, academic or not-for-profit sector
<b>Conference or Event</b>	A local, national, or international conference on the Scientific Cycle theme.  The Scholar will attend and take notes during this conference and share them with the rest of the cohort to enrich the reflections on the Scientific Cycle theme and to better prepare for the <i>Impact Conference</i> planned in Year 3.
<b>Location*</b>	In Canada or Internationally
<b>Sector</b>	In a private, governmental, academic or not-for-profit sector

\* *Note:* The objective of the location requirement is to develop networks and to share knowledge outside of one’s known environment in order to strengthen key leadership competencies. Therefore, Scholars, Mentors and Fellows are requested to ensure an equal balance in presenting at or attending conferences in Canada or at international locations throughout the three-year scientific cycle.

4.2.2 Any remaining amount of the maximum amount of \$10,000/year, after Study Plan activities in 4.2.1 that are approved by the Foundation, may be allocated to other activities and expenses related to Scholars’ research, travel or networking, as described in section A.2 of the Study Plan.

4.2.2.1 Kindly note that in accordance with Canada’s [Tri-Council Policy Statement on the Ethical Conduct for Research Involving Humans – TCPS 2 \(2018\)](#), Scholars who wish to carry out research involving human beings with funding from the Foundation must obtain an ethics certificate from their university and provide a copy of this certificate to the Foundation. This research includes, among others, field research, exploratory visits, interviews, archival research, research involving the First Nations, Inuit and Métis Peoples, or any other research activities described in the *TCPS 2 (2018)*.

- 4.2.3 Scholars are allowed to use up to \$5,000 of the Annual Travel Allowance per Reference Year towards travel, networking and attendance of Foundation events, including a community retreat, Institute of Engaged Leadership and other events organized by the Foundation.
- 4.2.4 A portion of up to \$5,000 of the ATA is allocated for Scholars to gain proficiency in Canada's official languages in accordance with the Foundation's [Policy on Language: BilingualismPlus](#) adopted in November 2019 (see section 4.14). This Policy and its guidelines on the use of the ATA are referenced in scholarship contracts with the Foundation, as well as their Study Plan, and seeks to implement the following objectives:
- 4.2.4.1 For Scholars who are not fluently bilingual in both of Canada's Official Languages (English and French): to support their knowledge and skills in the Official Language with which they are less familiar. This language training can be taken in group classes, private lessons, or other formats. In addition, the Foundation encourages organized and pre-approved immersive French or English language stays (please refer to Appendix E for a list of immersive language stays).
- 4.2.4.2 For Scholars who are already proficient in both of Canada's Official Languages: to pursue Indigenous language studies and familiarize themselves with Indigenous language(s), as well as to partake in pre-approved immersive stays in Indigenous language(s).
- 4.2.4.3 Since the objective of language learning also seeks to discover and better understand the diversity of Canadian culture and identity, language immersion stays must take place in one of the provinces or territories of Canada.
- 4.2.5 A maximum amount of \$5,000/year to participate in activities and events organized by the Foundation.

### **4.3 Air travel**

#### **Cost of air travel**

- 4.3.1 Claimants must, to the extent possible, book their flights through the Foundation's travel agent (see Appendix C).
- 4.3.2 Claimants must travel in economy class, with the exception of situations described in section 4.3.4. When possible, efforts should be made to book airfare in advance to take advantage of reduced fares. The Foundation encourages Claimants to book refundable and modifiable airfare when possible.
- 4.3.3 If a Claimant adjusts his or her travel schedule in order to reduce the total travel cost (for example, by staying at the destination overnight), a claim for accommodation and incidental expenses will be accepted, as long as these additional expenses were incurred to save costs to the Foundation overall. The Claimant must demonstrate the cost savings and will have to include quotes as supporting documentation.

4.3.4 Airfare in any other class greater than economy (or Economy Flex for Air Canada) will be allowed for:

- Flights without stopover with flying time greater than nine hours. The duration of the trip is calculated based on flight departure and arrival time, excluding stopover.
- When the other fare can be demonstrated to be more economical for the same destination and time frame.
- When the trip cost of staying overnight for a stopover flight (i.e. accommodations, incidentals) can be demonstrated to amount to more than a business-class night flight.
- A health condition exists, a medical certification is provided to the Foundation and prior approval is obtained with the Foundation.
- If no other alternative exists, the Foundation can authorize business-class travel in exceptional circumstances, if, for example, a Claimant must return home sooner than expected because of illness, accident, or emergency.

#### **Other air travel considerations**

4.3.5 Reservation changes must be minimized to avoid change fees. If a Claimant considers a change fee justified, for example in the case of illness or *force majeure*, the Claimant may submit the grounds for that justification when he or she requests reimbursement of the fee from the Foundation. If the Foundation does not consider the change justified, the change fee will remain for the Claimant's personal account.

In addition, when circumstances warrant the need to change the original flight date(s) or time, the fees associated with the change will be reimbursed with explanation. It is also advisable to make flight changes as early as possible to keep costs low.

4.3.6 Flight cancellation insurance is an allowable expense.

4.3.7 Where additional medical coverage is warranted, such coverage shall be considered an allowable expense. Medical coverage is warranted, for example, when Claimants do not have a prior coverage and participate in events or activities that are organized and/or approved by the Foundation.

4.3.8 Expenses related to stopovers in between flights will only be reimbursed if the stopover is deemed essential in relation to activities or events that are approved and/or organized by the Foundation. For example, expenses related to stopovers when there are no direct flight options or for very long flights (e.g., 9 hours long) to attend an event or activity that is organized and/or approved by the Foundation will be approved and reimbursed. Stopovers for other purposes, such as to carry out personal research or for personal leisure or business travel unrelated to the Foundation's affairs will not be approved or reimbursed by the Foundation unless the Claimant can prove that this will not incur additional costs.

4.3.9 Excess luggage fees when necessary for the purpose of the travel to attend activities or events organized and/or approved by the Foundation are considered allowable expenses.

- 4.3.10 The Foundation will not pay for flight upgrades or flight segments on travel undertaken for purposes unrelated to the Foundation's affairs.
- 4.3.11 No reimbursement can be claimed for air travel purchased with frequent flyer points. Frequent flyer points may be used for flight upgrades and segments provided there is no additional cost to the Foundation.

#### **Supporting documentation for air travel**

- 4.3.12 Copy of tickets or e-ticket which must include the passenger's name, flight information (date, origin, destination, flight number) and proof of payment.
- 4.3.13 Copies of boarding passes along with plane tickets should be provided as supporting documentation and kept for verification purposes. Electronic boarding passes are accepted.
- 4.3.14 Flight reservation confirmations are not considered to provide proof of payment. Other documents must be kept for verification purposes (for example, a credit card receipt or a credit card statement).

### **4.4 Train travel**

#### **Cost of train travel**

- 4.4.1 Claimants must travel in economy class, making their reservations in advance and adapting their schedules to take advantage of reduced fares rather than paying the full cost of economy class. Business-class fare is permitted when it can be demonstrated to be more economical than economy class for the same destination and time frame. When both travel options for train and plane are possible, it is better to retain the cheapest, unless there is a valid reason.
- 4.4.2 Roomette class rail fare is allowable if overnight travel is necessary.

#### **Other train travel considerations**

- 4.4.3 Reservation changes must be minimized to avoid change fees. If a Claimant considers a change fee justified, for example in the case of illness or *force majeure*, the Claimant may submit the grounds for that justification when he or she requests reimbursement of the fee from the Foundation. If the Foundation does not consider the change justified, the change fee will be for the Claimant's personal account.

#### **Supporting documentation for train travel**

- 4.4.4 Copies of boarding passes must be provided and kept, along with the train receipt, for verification purposes. Electronic boarding passes are accepted.

### **4.5 Collective modes of transportation**

- 4.5.1 Claimants are encouraged to use public transit and/or shuttles whenever available, for instance in urban settings or for transfers to and from an airport or train station. Collective transportation modes often present a more environmentally, economical, and effective transportation option.
- 4.5.2 Claimants may claim the cost of public transit and shuttle tickets purchased.

4.5.3 Claimants may claim reasonable taxi costs incurred for events or activities that are organized and/or approved by the Foundation.

## **4.6 Vehicles**

4.6.1 Vehicle transportation costs, i.e., kilometers or mileage, will be reimbursed when travelling by vehicle is the most practical and economical method of travel.

### **4.6.2 Vehicle rental**

4.6.2.1 Vehicle rentals are limited to the duration of travel approved by the Foundation to participate in activities or events organized and/or approved by the Foundation. Additional duration must be specifically requested to and approved by the Foundation and in conformity with section 4.11.

4.6.2.2 Claimants must rent compact vehicles, unless a larger vehicle is necessary for the purpose of the trip (for example, carpooling with other Foundation members to a Foundation event, travelling with large research material, etc.).

4.6.2.3 In addition to the cost of renting a vehicle, Claimants may claim fuel costs and insurance coverage (if necessary) and any kilometres or mileage charged by the rental company, as required. Claimants not already covered by auto rental insurance must explicitly purchase one from the rental company.

4.6.2.4 If a vehicle rental is connected to air travel, the traveler is encouraged to rent a vehicle through the Foundation's travel agent as per paragraph 4.3.1. No additional service fees apply.

### **4.6.3 Personal private vehicle**

4.6.3.1 Reimbursement is based on the per-kilometre rate that applies to the province or territory where the vehicle is registered in accordance with Appendix A. These rates will be adjusted from time to time, as necessary.

4.6.3.2 Fuel costs cannot be claimed, as they are included in the per-kilometre rate.

4.6.3.3 A third-party itinerary demonstrating kilometres travelled (a departure-to-destination itinerary from Google Maps, for example) should be submitted with the expense claim/activity report as supporting documentation.

### **4.6.4 Parking and tolls**

4.6.4.1 Claimants may claim reasonable parking expenses and tolls incurred for activities or events organized and/or approved by the Foundation.

4.6.4.2 Original receipts must be kept for verification purposes.

## **4.7 Accommodations**

### **Cost of accommodations**

- 4.7.1 Reasonable accommodation expenses (commercial accommodations or in a boarding facility) will be covered in relation to events or activities that are organized and/or approved by the Foundation. Before booking their accommodation, Claimants should consider factors such as distance from the place of business, event or research activity, access to public transit, Internet access, and breakfast costs, which may impact the cost of the overall trip.
- 4.7.2 Claimants may stay in commercial accommodations at a standard room rate.
- 4.7.3 Claimants may stay at no cost in private non-commercial accommodation, such as a private dwelling or non-commercial facilities where the Claimant does not normally reside. Free of charge Non-commercial accommodations are subject to reimbursement as per the daily allowance set out in Appendix B. The allowance is intended to cover expenses such as the cost of groceries or a gift to the hosts. This allowance will be adjusted from time to time, as necessary. The Foundation may request written confirmation from the host that the Claimant stayed in the private non-commercial accommodation and that the host received allocation or gift for such services.
- 4.7.4 If the stay in the accommodation is connected to air travel, the traveler is encouraged to book the hotel through the Foundation's travel agent as per paragraph 4.3.1. No additional service fees apply.
- 4.7.5 Hotel reservation confirmations are not considered to provide proof of payment. Other documents must be kept for verification purposes (for example, a hotel account statement, a credit card receipt or a credit card statement).

## **4.8 Meals**

### **Cost of meals**

- 4.8.1 Claimants' meal expenses will be reimbursed as per the allowance set out in Appendix B. The allowance will be adjusted from time to time, as necessary.
- 4.8.2 Claimants may claim the per-diem amounts set out in Appendix B.
- 4.8.3 Receipts are not required to claim per diems, however, Claimants are required to keep copies of their receipts for verification purposes.
- 4.8.5 A meal allowance or per diem cannot be claimed if a meal was provided by the Foundation, by the transportation carrier, in the accommodation rate or at a meeting the Claimant attended.

### **Other meals considerations**

- 4.8.6 Meal claims may include alcohol, on the understanding that the Foundation only reimburses the reasonable consumption of alcohol when taken with a meal; one drink per meal.
- 4.8.7 Foundation community members other than staff may not incur meal expenses on the Foundation's behalf.
- 4.8.8 When meals are taken with other Foundation Claimants, each Claimant is responsible for claiming his/her own meal up to the limit set out in Appendix B.

## 4.9 Incidental expenses

- 4.9.1 Incidental expenses are other necessary expenses incurred as a result of travel in relation to activities or events that are organized and/or approved by the Foundation. They include but are not limited to such items as gratuities, laundry, dry cleaning, personal health or hygiene products, phone calls to home, telecommunications hook-ups and service, and the shipping of some personal effects.
- 4.9.2 Claimants may claim the incidental expense allowance when their travel includes a night away. The Foundation applies the rates set out in Appendix B. These rates will be adjusted from time to time, as necessary. Receipts are not required to claim the incidental expense allowance.

## 4.10 Other expenses

- 4.10.1 Telephone calls or internet connections essential for work purposes during travel time will be reimbursed to the Claimant. Detailed original receipts and proof of payment must be kept for verification purposes.
- 4.10.2 Travel-insurance costs, as well as the costs of required inoculations, travel visas for international travel, and foreign exchange fees will be reimbursed. It is the Claimant's responsibility to purchase health insurance, including repatriation insurance, any time such insurance is required for travel undertaken for purposes related to activities or events that are organized/approved by the Foundation. Such costs may be reimbursed by the Foundation under the ATA.

## 4.11 Duration of travel and travel-related expenditures

Travel and travel-related expenditures (meals, vehicle rental and accommodations) may be incurred:

- 4.11.1 Activities or Events Organized by the Foundation
- a) Claimants may reserve their flights and accommodations to arrive up to 24 hours prior to the first day of the event or activity and depart up to 24 hours following the last day of the event or activity.
  - b) Claimants who wish to participate in networking activities with their scientific cycle cohort or other Foundation community members may reserve their flights and accommodations to arrive up to 48 hours prior to the first day of the event or activity. They must depart up to 24 hours following the last day of the event.
  - c) Networking may include, for example, knowledge-sharing and preparation for the planned activities or event, developing or strengthening peer-to-peer or mentoring relationships, teambuilding with the Foundation's scientific cycle cohort or community members. Claimants who choose to participate in community networking must report on their activities in their mid-term and annual activity reports.
- 4.11.2 Other Activities or Events Approved by the Foundation

- a) Claimants may reserve their flights and accommodations up to 24 hours prior to the first day of the event and depart up to 24 hours following the last day of the event proposed in their Study Plans and approved by the Foundation.
- b) Claimants who wish to arrive before or after the duration described in a) for networking purposes must clearly request this in their Study Plans, including the arrival and departure dates requested, the network they wish to develop relationships with, the relevance of this networking for their research or leadership development, as well as the activities or events planned during the additional days.
- c) Examples of networking costs may include the participation in assemblies, meetings or gatherings, workshops, conferences, forms of cultural respect or other that directly facilitate or contribute to the achievement of events and activities organized and/or approved by the Foundation. Such networking activities or events must be approved by the Foundation prior to incurring expenses.

#### **4.12 Language training: Policy on Language: BilingualismPlus**

- 4.12.1 Language training in relation to the Foundation's [Policy on Language: BilingualismPlus](#), as described in section 4.2.4 above, may be individual, computer-based, community-based or through courses available at colleges and universities or other recognized language schools. Language training is encouraged in organized or pre-approved programs.
- 4.12.2 Administrative costs related to testing and any associated costs related to formal certification are considered eligible expenses.
- 4.12.3 In addition to original receipts, the Scholars are asked to provide a proof of completion. For formal language training, Scholars will be asked to submit a transcript or letter from the language instructor or institution annually and upon completion of their training. For informal training, Scholars will be asked to submit alternative proof of completion documents pertinent to their individual plan, on an annual basis.
  - Pre-approved language training in one of the official languages of Canada (French and English) and Indigenous languages of Canada, as per section 4.2.4 above and the Foundation's *Policy on Language: BilingualismPlus* and Scholars' Study Plans.

#### **4.13 Research, travel, and networking expenses related to Scholar's doctoral research or Study Plan activities or events approved by the Foundation**

- 4.13.1 Research, travel and networking related to the Scholar's doctoral research as per section 4.2.1 and 4.2.2 above and described in Scholars' Study Plans, that are approved by the Foundation, are subject to the further provisions of this policy:
  - Studies related to the Scholar's research, can include activities such as field research, participating in a conference to gain insights, organizing or participating in a research focus group, workshop or seminar, archival and/or documentary research, consultations, research-creation (e.g., artistic, documentary or design research), etc.;

- Honoraria and reasonable gifts, max amount CDN\$ 75 per person, on a one-time or non-routine basis as a “thank you” or modest token of appreciation to research participants and community partners. Such gifts or honoraria must be pre-approved by the Foundation and by the Ethics Board of the Scholar’s academic institution. The Scholar must keep ethics certification documents and proof of payment, such as a letter signed by the participant that includes the fee, name of the person, when the person was compensated and whether the payment was in cash or in-kind, for verification purposes. If a gift is given in lieu of cash, the Scholar must keep the original invoice for the gift in addition to a signed letter from the participant acknowledging receipt for verification;
- Purchase of books, electronic books, articles, journals, subscriptions, and audio-recordings related to research or Foundation activities and events, up to a limit of \$500 / per Reference year;
- Subscriptions to software services that allow the Scholar to carry on research activities (e.g. Zoom, LinkedIn, data collection or management software, research engines, etc.), up to a limit of \$1,000 / per Reference year.
- Conference, seminar and other events’ registration fees, if such events were proposed in Scholars’ Study Plans and pre-approved by the Foundation;
- Purchase of relevant and minor research equipment and supplies up to \$1,000 per year. Such expenses do not include the cost of Internet services at one’s residence. Examples of such expenses include, but are not limited to: recording equipment, hard drives to store data collection and interviews;
- Translation and interpretation costs for data collection and research activities;
- Editing, writing support, open access publication fees, posters, pamphlets, video editing and other costs to facilitate and support activities or events that are organized and/or approved by the Foundation;
- Transcription of interviews or data collection;
- Dependent care (see details in 4.14).

For other expenses, Scholars must make a specific request to the Foundation and obtain written approval.

#### 4.14 Dependent care

- 4.14.1 If a Claimant on parental leave must travel with a child under the age of two and must be accompanied by a third person who will see to the child’s needs during the Claimant’s participation in events or activities that are organized and/or approved by the Foundation, the Claimant may use his or her ATA to cover the reasonable travel expenses of this child and the third party.
- 4.14.2 Claimants may use their ATA for reasonable dependent care expenses that are incurred as a result of travel to events or activities that are organized and/or approved by the Foundation. The Claimant may claim up to \$35 per day per household with a signed declaration, to a daily maximum of \$75 per household with a receipt/letter signed that includes name, contacts, and address of the arm’s length childcare provider. Original receipts and proof of payment must be kept for verification purposes.

#### 4.15 Costs for individuals with disabilities

4.15.1 Reasonable costs incurred to provide support for individuals with disabilities while travelling for events or activities that are organized and/or approved by the Foundation may be reimbursed. Such costs may be excluded from the calculation of their ATA if reasonable. The Claimant should obtain preapproval from the Foundation and provide a medical certificate.

#### **4.16 Non-eligible expenses**

4.16.1 Non-eligible expenses include but are not limited to international driving licence costs, traffic or parking violations, fines, fees, interest charges, carbon offset fees, avoidable change fees, avoidable cancellation fees, avoidable late fees, personal expenses, expenses reimbursed by other organizations or funding sources.

4.16.2 Spouses' or dependents' travel, accommodation, or other types of expenses will not be reimbursed by the Foundation, except for dependent's travel if the Claimant is on approved parental leave.

4.16.3 Any expense deemed inappropriate or excessive will be declined by the Foundation.

4.16.4 As mentioned in sections 4.1 and 4.2, Scholars' ATA covers travel, research and networking expenses related to events or activities that are organized and/or approved by the Foundation. Other expenses, such as Scholars' tuition and auxiliary fees for their doctoral programs or any other academic or research programs, including programs to study abroad, are ineligible under the ATA. On the other hand, the annual scholarships of \$40,000 offered by the Foundation to its Scholars may cover daily living expenses at Scholars' discretion.

4.16.5 The ATA may not be used to cover normal living expenses, such as internet expenses, or any expenses that are not incurred as a result of participating in activities or events that are organized and/or approved by the Foundation.

4.16.6 The purchase of standard office equipment such as desks, chairs, filing cabinets, photocopiers, printers, shelves, except under exceptional circumstances related to the pandemic or in cases of disability.

4.16.7 Commuting costs of Scholars between their residence and place of employment, or between two places of employment.

4.16.8 Passport and immigration fees, including travel to an Embassy to obtain passport, visa or other citizenship or travel documents, except under exceptional or urgent circumstances, when the Claimant must travel for purposes directly related to activities or events that are approved and/or organized by the Foundation or consistent with the Claimant's scholarship agreement with the Foundation.

4.16.9 Costs associated with thesis examination/defence, including external examiner costs.

4.16.10 Reimbursement for airfare purchased with personal frequent flyer points programs.

## 5. PROCEDURES FOR CLAIMING REIMBURSEMENT OF EXPENSES

### 5.1 Supporting documentation for reimbursement claims

5.1.1 In order to be eligible for reimbursement, expenses must be:

- Related to events or activities that are organized and/or approved by the Foundation prior to being incurred;
- Incurred by the Claimant or reserved by the Foundation or through the Foundation's travel agent;
- Sufficiently justified (e.g., purpose of trip, dates and destinations)
- Sufficiently documented (official documentation indicating relevant dates, proof of invitation, letters where relevant, etc.);
- Verifiable by financial services and auditors;
- Evidenced by a receipt, proof of occurrence and/or proof of payment.

5.1.2 Failure to include the information in 5.1.1 may result in delays in processing the reimbursement.

5.1.3 The Claimant must append all original receipts, invoices, and other supporting documents (for example: boarding passes, Google Maps printouts, Bank of Canada currency exchange rate calculations, credit card or bank statements) to the duly completed reimbursement form or financial activity report.

5.1.4 If the receipts, invoices, and other supporting documents do not provide sufficient information about a particular expense, the Claimant must also provide a signed note describing the expense.

5.1.5 Although the Foundation does not require receipts for per diem expenses incurred during travel outside of a Claimant's residence, it is recommended that Claimants keep their original receipts in the event that they are audited by the Canada Revenue Agency.

5.1.6 Claimants are recommended to keep photocopies of all original documents they submit with their claims for random verifications.

5.1.7 Whenever receipts and other documents are provided, it is understood that the claims and supporting documents may be submitted to the Foundation either by mail or in electronic format (PDF files sent by email to Accounts Payable). In some instances, providing the information to the Foundation electronically may accelerate the reimbursement process. In the case of electronic submissions, the Foundation may also request the original paper document(s).

5.1.8 Submitting an electronic claim does not relieve the Claimant from the obligation of providing original receipts to the Foundation or to a revenue agency. To that effect, it is recommended that the Claimant retain all original documentation for a period of at least seven years.

### 5.2 Disbursement of the annual travel allowance

5.2.1 The ATA bestowed to Scholars may be requested via claims for reimbursement after the expenses have been incurred (5.3) up until the end of each reference year. Since January 1, 2022, the Foundation no longer disburses the ATA to Scholars by instalments paid in advance.

### 5.3 Claims for reimbursement

5.3.1 Expense claims should be submitted promptly to the Foundation for reimbursement using the Foundation's template provided as a Financial Activity Report. Receipts must be provided with the activity report.

5.3.2 Given that the Foundation's fiscal year end is August 31, expenses incurred or expected to be incurred during the reference year must be claimed to the Foundation no later than August 15 to facilitate the annual year-end audit process.

### 5.4. Annual Travel Allowance Start Date

5.4.4 The start date of the first ATA period for a Scholar begins when the Foundation has confirmed by email that it is in receipt of the following documents:

- A fully executed original agreement of their Scholarship with the Foundation; and
- Any additional documents required in their agreement.

5.4.5 The first ATA period ends on August 31 of the year following the signature of the funding agreement with the Scholar. In subsequent years, the ATA period runs from September 1 to August 31.

### 5.5 Other considerations

5.5.1 The Foundation may ask Claimants to present other documents or provide other information to support their claim.

5.5.2 The exchange rate used to convert foreign currency for expenses incurred by the Claimants should correspond with one of the following rates:

- (a) the conversion rate indicated on the monthly credit card account statement or on the statement obtained from the exchange bureau; or, if not available,
- (b) the conversion rate established by the Bank of Canada for the period in which the expense was incurred.

#### Audits by the Foundation

5.5.3 The Foundation has committed to undertaking systematic audits of a sample or the entirety of the travel claims of its Claimants. Claimants should always be prepared to provide original receipts and complete information to the Foundation, including in instances where daily allowances were claimed. All supporting documentation must be kept for at least seven years.

5.5.4 When audited, the Claimants are expected to fully cooperate with the Foundation to provide the information requested in a timely fashion.

## 6. DISTRIBUTION OF THIS POLICY

This policy applies to business travel undertaken with the Foundation's authorization for activities related to a scholarship awarded by the Foundation, including participation in activities or events organized by the Foundation, official languages and Indigenous languages learning as per the Foundation's [Policy on Language: BilingualismPlus](#) and Study Plan frameworks and research, dissemination and networking activities related to Scholars' Study Plans approved by the Foundation.

Each new Foundation community member will receive a copy of this policy. The policy is updated from time to time, usually every year. An up-to-date version of this document is available on the Foundation's website at [www.trudeaufoundation.ca](http://www.trudeaufoundation.ca).

## 7. APPLICATION

Foundation management, drawing on standards in effect in similar organizations, develops and updates the travel procedures, which are subject to change from time to time. Foundation personnel are responsible for enforcing the application of the Travel and Research Expenses Policy.

## APPENDIX A

### PER-KILOMETRE RATE

Effective 1 April 2022

The rates payable in cents per kilometre for the authorized use of a personal vehicle for travel authorized by the Foundation are as follows:

<b>Cents/km (taxes included)</b>	
	cents
All provinces in Canada, except Newfoundland and Labrador .....	54.0
Newfoundland and Labrador .....	58.0
North West Territories, Nunavut, Yukon .....	60.0

The rate payable is the rate that applies in the province or territory where the vehicle is registered.

These rates are subject to change from time to time.

\* The Foundation generally observes the guidelines of the Government of Canada's National Joint Council to determine the US and international kilometre rates: [www.njc-cnm.gc.ca](http://www.njc-cnm.gc.ca).

## ANNEX B

### PER DIEM ALLOWANCES \*

**In Canadian dollars (taxes included)**

**Effective 1 April 2022**

	Canada & USA	Yukon & Alaska	N.W.T.	Nunavut
<b>1. Canada</b>				
<b>1.1 Private non-commercial accommodation allowance</b>				
Day 1–120	50.00	50.00	50.00	50.00
<i>Day 121 onward</i>	<i>25.00</i>	<i>25.00</i>	<i>25.00</i>	<i>25.00</i>
<b>1.2 Meal allowances</b>				
breakfast - 100% (up to 30 <sup>th</sup> day)	21.90*	23.20	25.10	28.35
<i>breakfast - 75% (31<sup>st</sup> to 120<sup>th</sup> day)</i>	<i>16.45*</i>	<i>17.40</i>	<i>18.85</i>	<i>21.25</i>
<i>breakfast – 50% (121<sup>st</sup> day onward)</i>	<i>10.95*</i>	<i>11.60</i>	<i>12.55</i>	<i>14.20</i>
<b>lunch</b>				
lunch - 100% (up to 30 <sup>th</sup> day)	22.15*	21.30	30.45	34.45
<i>lunch - 75% (31<sup>st</sup> to 120<sup>th</sup> day)</i>	<i>16.60*</i>	<i>16.00</i>	<i>22.85</i>	<i>25.85</i>
<i>lunch – 50% (121<sup>st</sup> day onward)</i>	<i>11.10*</i>	<i>10.65</i>	<i>15.25</i>	<i>17.25</i>
<b>dinner</b>				
dinner - 100% (up to 30 <sup>th</sup> day)	54.40*	61.45	65.15	91.75
<i>dinner - 75% (31<sup>st</sup> to 120<sup>th</sup> day)</i>	<i>40.80*</i>	<i>46.10</i>	<i>48.85</i>	<i>68.80</i>
<i>dinner – 50% (121<sup>st</sup> day onward)</i>	<i>27.20*</i>	<i>30.75</i>	<i>32.60</i>	<i>45.90</i>
<b>Meal allowance total</b>				
Meal allowance total – 100% (up to 30 <sup>th</sup> day)	98.45*	105.95	120.70	154.55
<i>Meal allowance total – 75% (31<sup>st</sup> to 120<sup>th</sup> day)</i>	<i>73.85*</i>	<i>79.50</i>	<i>90.55</i>	<i>115.90</i>
<i>Meal allowance total – 50% (121<sup>st</sup> day onward)</i>	<i>49.25*</i>	<i>53.00</i>	<i>60.40</i>	<i>77.35</i>
<b>1.3 Incidental allowance – 100% (up to 30<sup>th</sup> day)</b>				
<i>Incidental allowance – 75% (31<sup>st</sup> day onward)</i>	<i>13.00*</i>	<i>13.00</i>	<i>13.00</i>	<i>13.00</i>
<b>Daily Total</b>				
Meals and incidentals – 100% (up to 30 <sup>th</sup> day)	115.75*	123.25	138.00	171.85
<i>Meals and incidentals – 75% (31<sup>st</sup> to 120<sup>th</sup> day)</i>	<i>86.85*</i>	<i>92.50</i>	<i>103.55</i>	<i>128.90</i>
<i>Meals (50%) and incidentals (75%) (121<sup>st</sup> day onward)</i>	<i>62.25*</i>	<i>66.00</i>	<i>73.40</i>	<i>90.35</i>

These rates include taxes and are subject to change from time to time.

\* In CAD dollars for travel in Canada and USD dollars for travel in the United States.

\* The Foundation generally observes the guidelines of the Government of Canada's National Joint Council to determine the daily allowances [www.njc-cnm.gc.ca](http://www.njc-cnm.gc.ca). For Canada and the USA, please consult the above and [Appendix C - Allowances - Modules 1, 2 and 3](#). For international travel, please consult [Travel Directive, Appendix D - Allowances - Module 4](#).

**APPENDIX C**  
**FOUNDATION'S TRAVEL AGENCY**

**VP Travel**

[PETFbooking@vptravel.ca](mailto:PETFbooking@vptravel.ca)

355 Ste-Catherine St. W, suite 601  
Montréal, Quebec H3B 1A5  
www.groupevoyagesvp.ca  
514-342-4461 / 1-888-713-3311  
Monday to Friday, from 8:30 a.m. to 6 p.m.

On your first travel request, please fill in and submit the Claimant Profile form on the next page. The information provided will help speed up your future requests.

Please provide all relevant information when making a travel request, including:

**Flight**

Name and given names of the traveler : (Must match the name on the passport)	
If travel is international, please supply your date of birth for TSA : dd/mm/yyyy	
City of departure :	
City of return :	
Departure date and preferred schedule:	
Return date and preferred schedule:	
Reason of travel :	
Account reference, project name or event:	

**Hotel and car**

Hotel : (please include specifications, if any)	
Car : (please include specifications, if any)	

<b>Claimant Profile</b>
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**Contact information**

<b>Name:</b>		<b>Title:</b>	
<b>Organization:</b>			
<b>Department:</b>		<b>Identification #</b>	
<b>Office address:</b>			
<b>Home address:</b>			
<b>Office phone number:</b>		<b>Fax:</b>	
<b>Home phone number:</b>		<b>Cell phone:</b>	
<b>Email:</b>		<b>Others:</b>	
<b>Assistant's name:</b>		<b>Phone:</b>	
<b>Fax:</b>		<b>Email:</b>	
<b>Contact in case of emergency (name and phone number):</b>			

**Air and train travel information**

<b>Preferred airline(s)</b>	
<b>Frequent flyer number</b>	
<b>Seat preference</b>	
<b>Meal requirements</b>	
<b>Other requests</b>	
<b>Other requests</b>	

**Preferred hotel information**

<b>Name and city:</b>		<b>Membership #:</b>	
<b>Name and city:</b>		<b>Membership #:</b>	
<b>Name and city:</b>		<b>Membership #:</b>	
<b>Name and city:</b>		<b>Membership #:</b>	
<b>Name and city:</b>		<b>Membership #:</b>	
<b>Room preference:</b>	<b>Smoking ?:</b>		
<b>Other requests:</b>			

**Car rental information**

<b>Preferred company:</b>		<b>Membership #</b>	
<b>Preferred company:</b>		<b>Membership #</b>	
<b>Preferred company:</b>		<b>Membership #</b>	
<b>Preferred car type and category :</b>			
<b>Smoking?</b>			

**International travel information**

<b>Passport number</b>	
<b>Issuance date and place</b>	
<b>Expiry date</b>	
<b>Date of birth</b>	
<b>Citizenship</b>	
<b>Country of birth</b>	
<b>Nexus/CANPASS number</b>	

**Credit card information (business): Flight tickets**

<b>Credit card company:</b>	
<b>Card number:</b>	
<b>Expiration date:</b>	
<b>Name of cardholder:</b>	
I hereby authorize Groupe Voyages VP to charge my credit card for business travel purposes:	
<b>Cardholder's signature:</b>	

**Credit card information (business): Guarantee for hotel booking and car rental**

<b>Credit card company:</b>	
<b>Card number:</b>	
<b>Expiration date:</b>	
<b>Name of cardholder:</b>	
I hereby authorize Groupe Voyages VP to charge my credit card for business travel purposes:	
<b>Cardholder's signature:</b>	

**Credit card information (personal travel purposes)**

<b>Credit card company:</b>	
<b>Card number:</b>	
<b>Expiration date:</b>	
<b>Name of cardholder:</b>	
I hereby authorize Groupe Voyages VP to charge my credit card for personal travel purposes:	
<b>Cardholder's signature:</b>	

Your signature: \_\_\_\_\_ Date: \_\_\_\_\_