

POLICY

| *Travel and Research Expenses Policy – Fellows & Mentors and Other Claimants*

| 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 Fellows and Mentors, and, where applicable, to staff, personnel, Directors and Members, and other governance committee members and Claimants who are eligible consistent with the Foundation’s policies and procedures (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 fellowship, mentorship or other agreement between the Claimant and the Foundation.

4.1 Research, travel and networking allowance for Fellows & Mentors

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

Fellows and Mentors have access to an ATA per Reference Year for participation in activities in relation with their Fellowship or Mentorship Contracts with the Foundation, and participation in the Foundation’s events and activities. This amount is distributed according to the allocations in section 4.2 and in accordance with Fellows and Mentors Contracts with the Foundation.

Information for Fellows and Mentors:

Travel expenses of the Foundation’s Fellows and Mentors will be deducted from their ATA in accordance with their agreement currently in effect, including for research, travel and networking related to the events and activities organized by the Foundation.

Since 2019, research expenses for Fellow and Mentors are no longer reimbursed by the Foundation, unless they relate to research expenses in the context of leadership programs, events or activities organized by the Foundation.

4.2 Research, travel, and networking annual travel allowance for Fellows & Mentors – Allocations

4.2.1 Fellows and Mentors are allowed to use their ATA per Reference Year towards:

4.2.1.1 Travel, networking, research for activities and events organized by or approved by the Foundation, as well as participation in Foundation events and activities, including a community retreat, Institute(s) of Engaged Leadership, *the Impact Conference*.

4.2.1.2 In the context of a mentoring relationship between a Fellow or Mentor and a Scholar with whom they have been paired by the Foundation, the ATA may cover travel, networking and research expenses of Fellows and Mentors to:

4.2.1.2.1 meet the Scholar in-person for the purposes of developing their Study Plans or for professional development for up to two roundtrips per year.

4.2.1.2.2 mentor, guide, accompany or coach the Scholar in the implementation of their Communication and Knowledge-Sharing Study Plan (“Study Plan”) activities (only if the Foundation has approved the activities proposed in the said Study Plan).

Information for Fellows and Mentors

Every year, Fellows and Mentors will be paired by the Foundation with one or two Scholars to offer mentorship and guidance in developing and implementing the Scholar’s Communication and Knowledge-Sharing Study Plan (“Study Plan”) and a corresponding budget, in the template provided by the Foundation.

In the context of this mentoring relationship between a Fellow or Mentor and a Scholar, this Policy will only cover activities or events that have been described in the Scholar’s Study Plan and submitted to the Foundation, with a corresponding budget, in the template provided by the Foundation. The Foundation will review and approve the proposed Study Plans and budgets that are consistent with its 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.**

4.2.1.3 Applicable Excerpts of the Study Plan to Fellows and Mentors

Part A – Knowledge Dissemination and Conference Participation

Scholars will be paired with a Mentor or Fellow at the Foundation every 6 to 12 months. The Mentor or Fellow will share access to their networks for the Scholar that they are paired with to present at a public and non-academic conference in Years 1, 2 and 3, and to attend a conference on the scientific cycle theme in order to take notes and share them with the cohort in Years 1 and 2. In addition, it is desirable that Fellows and Mentors accompany and offer mentoring to Scholars on location at these events.

A.1 Knowledge-Sharing Conferences and Events

As a priority, a portion of up to \$10,000 per year [of the Scholars’ ATA] will support:

Year 1	
Conference or Event	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.
Location*	In Canada or Internationally
Sector	In a private, governmental or not-for-profit sector
Conference or Event	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.
Location*	In Canada or Internationally
Sector	In a private, governmental, academic or not-for-profit sector

Year 2	
Conference or Event	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.
Location*	In Canada, if you presented at an international location in Year 1. Internationally, if you presented in Canada in Year 1.
Sector	In a private, governmental, academic or not-for-profit sector
Conference or Event	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.
Location*	In Canada or Internationally
Sector	In a private, governmental, academic or not-for-profit sector
Year 3	
Conference or Event	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.
Location*	In Canada or Internationally
Sector	In a private, governmental 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 scholarships.

4.2.1.4 All other travel, research and networking expenses that are necessary to complete the activities or participate in events in accordance with Fellowship or Mentorship services described in Fellows' and Mentors' Contracts with the Foundation, and as approved by the Foundation.

4.2.2 A portion of up to \$5,000 of the total amount of the ATA is optionally available for Fellows and Mentors who wish to gain proficiency in Canada's official languages in accordance with the Foundation's [Policy on Language: BilingualismPlus](#) adopted in November 2019. This Policy and its guidelines on the use of the ATA are referenced in the Fellowship and Mentorship contracts with the Foundation and seeks to implement the following objectives:

4.2.2.1 For Fellows and Mentors 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.

- 4.2.2.2 For Fellows and Mentors 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).
- 4.2.2.3 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.

4.3 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 money 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 long. The duration of the trip is calculated based on flight departure and arrival time, excluding stopover.
 - When business-class 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 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 approved and/or organized 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 travel to attend activities or events that are approved and/or organized 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 activities related to the Foundation's goals.

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 community 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 4.2.1. 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

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

4.6.5.2 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 activities or events 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 reimbursed 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 4.2.1. No additional service fees apply.
- 4.7.6 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 cannot be claimed if a meal was provided by the Foundation, by the transportation carrier or 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 organized by the Foundation or mentoring offered by Fellows and Mentors in relation to Scholars' Study Plans 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 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 writing to the Foundation, 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

- 4.12.2 Language training in relation to the Foundation's [Policy on Language: BilingualismPlus](#), as described in section 4.2.2 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.
- 4.12.3 Administrative costs related to testing and any associated costs related to formal certification are considered eligible expenses.
- 4.12.4 In addition to original receipts and an expense report, Fellows and Mentors are asked to provide the following information for reimbursement of their expenses:
- The title or description of the course or program that is offered, including the organization or person offering the course and contact information.
 - A URL - website, if applicable, or email or poster announcement of the course.
 - The dates or period of the course/program.
 - The costs to participate in the course/program, by completing an Expense Report of the Foundation

4.13 Participation and preparation for activities or events organized/approved by the Foundation

- 4.13.1 In accordance with Fellows and Mentors' contracts with the Foundation and other Claimants' agreements with the Foundation, out of pocket expenses incurred for the participation in or in the preparation of content for activities or events that are organized and/or approved by the Foundation are considered eligible expenses and may be reimbursed by the Foundation. For Fellows and Mentors, such expenses will be reimbursed using the ATA funds and can include research expenses related to the content of the Fellow or Mentor's session at an Institute of Engaged Leadership (Institute) or at the Impact Conference, translation expenses related to the content of the Fellow or Mentor's session at an Institute or the Impact Conference and the cost of journals and articles to support the content of the Fellow or Mentor's session at an Institute or the Impact Conference. Any question on the eligibility of expenses should be directed at the Foundation.

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 With the exception of language learning according to the Foundation's [Policy on Language: BilingualismPlus](#) tuition and auxiliary fees for academic or research programs, including programs to study abroad, are ineligible under the ATA.

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 Claimants 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 services, activities or events that are approved and/or organized by the Foundation or consistent with the Claimant's 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 organized by the Foundation; or for mentoring offered for events or activities in Scholars' Study Plans, 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 explained (purpose of trip, dates and destinations)
- Sufficiently documented (official documentation indicating dates of conferences, proof of invitation);
- 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, we recommend 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 speed up 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 annual travel allowance (ATA) 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 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 expense claim form in the template provided by the Foundation.

5.3.2 Given that the Foundation's fiscal year end is August 31, expenses incurred between July 31 and August 31 of the next year must arrive at the Foundation no later than September 15 to facilitate the annual year-end audit process. Expenses not claimed by that date may be deemed inadmissible for reimbursement by the Foundation.

5.4 Annual Travel Allowance start date

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

- A fully executed original agreement of their Fellowship or Mentorship program with the Foundation; and
- Any additional documents required in their agreement.

5.4.2 The first ATA period ends on August 31 of the year following the signature of the funding agreement with the Scholar, Fellow, Mentor. 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 or events, including activities and events organized by the Foundation, activities and events related to a mentorship or fellowship awarded by the Foundation, Fellows' and Mentors' official languages and Indigenous languages learning as per the Foundation's [Policy on Language: BilingualismPlus](#), and mentoring Scholars in relation to their Study Plans approved by the Foundation.

Each new Foundation community member will receive a copy of this directive. The policy is updated from time to time, usually every year, on or around May 31st. An up-to-date version of this document is available on the Foundation's website at 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:

Cents/km (taxes included)	
	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.

ANNEX B
PER DIEM ALLOWANCES *

In Canadian dollars (taxes included)
Effective 1 April 2022

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

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)	

Claimant Profile

Contact information

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

Air and train travel information

Preferred airline(s)	
Frequent flyer number	
Frequent flyer number	
Frequent flyer number	
Frequent flyer number	
Seat preference	
Meal requirements	
Other requests	
Other requests	

Preferred hotel information

Name and city:		Membership #:	
Name and city:		Membership #:	
Name and city:		Membership #:	
Name and city:		Membership #:	
Name and city:		Membership #:	
Room preference:	Smoking ?:		
Other requests:			

Car rental information

Preferred company:		Membership #	
Preferred company:		Membership #	
Preferred company:		Membership #	
Preferred car type and category :			
Smoking?			

International travel information

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

Credit card information (business): Flight tickets

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

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

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

Credit card information (personal travel purposes)

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

Your signature:

Date: