



## TRAVEL AND RESEARCH EXPENSE POLICY

### 1. INTRODUCTION

This Travel Policy states the goals, principles, and procedures used by the Pierre Elliott Trudeau Foundation (the “Foundation”) to govern the travel on Foundation business undertaken by scholars, mentors, fellows, members, directors, staff, and other travellers (the “traveller”). This policy may be updated from time to time as required.

### 2. GOALS AND PRINCIPLES

The Foundation’s Travel Policy has the following goals:

- To ensure the exemplary management of the Foundation’s resources, drawing on standards in effect in similar organizations;
- To optimize the use of resources allotted for travel;
- To offer travel conditions that meet travellers’ legitimate needs and expectations;
- To simplify program administration by clarifying travel rules and reducing the number of requests for authorization addressed to Foundation personnel; and
- To realize savings on travel and accommodations costs and reinvest these savings in causes related to the Foundation’s mandate.

The following principles govern the policy:

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

### 3. PROCEDURES

#### 3.1 Research, travel and networking allowance

The travel expenses of the Foundation’s mentors from all cohorts will be deducted from those individuals’ research, travel and networking allowance in compliance with the financing agreements currently in effect. Similarly, the travel expenses of the Foundation’s fellows from the 2014 cohort onward will be deducted from those individuals’ research, travel and networking allowance on account at the Foundation, when such travel is incurred to take part in events organized by the Foundation. The costs of fellows’ research-related travel (travel incurred not to attend Foundation events, but to conduct research and networking) may be charged to fellows’ fellowship funds on account at their university, as per the funding guidelines circulated to Trudeau fellows upon their appointment. Scholars will receive three advances each year from

their research, travel and networking allowance and will submit expense reports to justify their expenses in accordance with this policy.

Based on the application of this policy, Foundation Management may, at any time, refuse to cover an expense considered unjustified or unreasonable. A program beneficiary's refusal to comply with this policy or his or her provision of a false statement could provide cause for termination of the scholarship, mentorship or fellowship funding agreement between the program beneficiary and the Foundation.

## **3.2 Air travel**

- 3.2.1 Travellers must, to the extent possible, book their flights through the Foundation's travel agent (see Appendix C). While service fees apply, this aims to regroup air travel to achieve economies of scale and to facilitate the application of this policy as well as accounts reconciliation.
- 3.2.2 Travellers 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.
- 3.2.3 If a traveller adjusts his or her travel schedule in order to reduce the total travel cost (for example, by staying at the destination over a Saturday night), a claim for accommodation and incidental expenses will be accepted, as these additional expenses were incurred to save money on an economy-class ticket. Air travel at full economy cost must be authorized in advance by the Foundation.
- 3.2.4 The Foundation may authorize business-class travel for trips over nine hours long. The duration of the trip is calculated based on flight departure and arrival time.
- 3.2.5 The purchase of a business-class night flight will be permitted if this purchase reduces the total cost of the trip to an amount less than the trip would have cost had the traveller stayed overnight.
- 3.2.6 If no other alternative exists, the Foundation can authorize business-class travel in exceptional circumstances, if, for example, a traveller has to return home sooner than expected because of illness, accident, or emergency.
- 3.2.7 Reservation changes must be minimized to avoid change fees. If a traveller considers a change fee justified, for example in the case of illness or *force majeure*, the traveller 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 traveller's personal account.
- 3.2.8 Boarding passes must be kept, along with airplane tickets, for verification purposes. Electronic boarding passes are accepted.

### **3.3 Train travel**

- 3.3.1 Travellers 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.
- 3.3.2 Reservation changes must be minimized to avoid change fees. If a traveller considers a change fee justified, for example in the case of illness or *force majeure*, the traveller 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 traveller's personal account.
- 3.3.3 Boarding passes must be kept, along with the train itinerary and receipt, for verification purposes. Electronic boarding passes are accepted.
- 3.3.4 Travelers are encouraged to take advantage of the Foundation's discount code number 811025 with Via Rail Canada.

### **3.4 Collective transportation modes**

- 3.4.1 Travellers are encouraged to use public transit and other shuttles whenever available, for instance in urban setting or for transfers to and from an airport or train station. Collective transportation modes often present a more environmentally, economical, and effective transportation option.
- 3.4.2 Travellers may claim the cost of the tickets purchased.

### **3.5 Vehicles**

- 3.5.1 Vehicle transportation costs will be reimbursed when travelling by vehicle is the most practical and economical method of travel.
- 3.5.2 The choice between renting a vehicle and using the traveller's own vehicle must be based on cost.
- 3.5.3 Vehicle rental
  - 3.5.3.1 Vehicle rentals are limited to seven days per trip.
  - 3.5.3.2 Travellers must rent compact vehicles.
  - 3.5.3.3 In addition to the cost of renting a vehicle, travellers may claim fuel costs and insurance as required.
  - 3.5.3.4 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 3.2.1. No additional service fees apply.
- 3.5.4 Personal vehicle

3.5.4.1 Reimbursement is based on a certain rate per kilometre. To determine the per-kilometre rate that applies to the province or territory where the vehicle is registered, please consult Appendix A. These rates will be adjusted from time to time as necessary.

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

3.5.4.3 An itinerary justifying kilometres travelled (a departure-to-destination itinerary from Google Maps, for example) must be kept for verification purposes and submitted with the expense claim/activity report.

### 3.5.5 Parking and taxis

3.5.5.1 Travellers may claim reasonable parking expenses incurred for activities related to the Foundation's goals.

3.5.5.2 Travellers may claim reasonable taxi costs incurred for activities related to the Foundation's goals.

3.5.5.3 Original receipts must be kept for verification purposes.

## 3.6 Other methods of transportation

3.6.1 Travellers must travel in economy class and look for the lowest available price for their travel. The original receipts, itinerary and ticket stubs must be kept for verification purposes.

## 3.7 Accommodations

3.7.1 Reasonable accommodation expenses (commercial accommodations or board in a boarding facility) will be covered. Before booking their accommodation, travellers should consider factors such as distance from the place of business, access to public transit, Internet access, and breakfast costs, which may impact the cost of the overall trip.

3.7.2 Travellers may stay in private non-commercial accommodation: a private dwelling or non-commercial facilities where the traveller does not normally reside. Non-commercial accommodations costs will be 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.

3.7.3 The cost of non-commercial accommodations (for example, a boarding house or apartment rental) for a period longer than seven days will be reimbursed. Original receipts must be kept for verification purposes.

3.7.4 If the accommodation is connected to air travel, the traveler is encouraged to book the hotel through the Foundation's travel agent as per paragraph 3.2.1. No additional service fees apply.

### **3.8 Meals**

- 3.8.1 Travellers' 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. Receipts are not required to claim per diems.
- 3.8.2 Alternatively, if travellers' expenses are less than the allowance set out in Appendix B, travellers may choose to submit original receipts for meals. Detailed original receipts must be kept for verification purposes. A credit card receipt alone is not sufficient.
- 3.8.3 A meal allowance shall not be claimed if a meal was provided by the carrier or at a meeting the traveller attended.
- 3.8.4 Meal claims may include alcohol, on the understanding that the Foundation only reimburses the reasonable consumption of alcohol when taken with a meal.
- 3.8.5 Foundation community members other than staff may not incur hospitality expenses on the Foundation's behalf.
- 3.8.6 When meals are taken with other Foundation travellers, each traveller is responsible for claiming his/her own meal up to the limit set out in Appendix B.

### **3.9 Incidental expenses**

- 3.9.1 Incidental expenses are incurred as a result of having to travel. They include but are not limited to such items as gratuities, laundry, dry cleaning, personal health or hygiene products, phone calls home, pet care, telecommunications hook-ups and service, and the shipping of some personal effects.
- 3.9.2 Travellers 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.

### **3.10 Other expenses**

- 3.10.1 The Foundation will not pay for flight upgrades or flight segments on travel undertaken for purposes unrelated to the Foundation's affairs.
- 3.10.2 Telephone calls or internet connections for work purposes will be reimbursed to the traveller. Detailed original receipts must be kept for verification purposes.
- 3.10.3 It is the traveller's responsibility to purchase health insurance, including repatriation insurance, any time such insurance is required for travel undertaken for purposes related to the Foundation's affairs. If these are necessary and not covered otherwise for the traveller, the travel-insurance costs, as well as the costs of required inoculations and visas, will be reimbursed.

### **3.11 Research expenses for scholars**

To be eligible, scholars' research expenses must relate to the following activities and are subject to the further provisions of this Agreement:

- Studies;
- Research at an institution or fieldwork location away from the home university;
- Any PIP event to which a Scholar is invited by the Foundation
- Language training program in Canada. To be eligible for fee reimbursement, the Scholar must enroll in a recognized language school and must keep proof of completion for the private or group language courses (transcript, attestation, etc.) for verification purposes
- The visit of an expert for research-related purposes; the Scholar must inform the expert that his or her expenses will be subject to the terms and conditions herein;
- Transportation;
- Accommodation;
- Per diems for stay outside Canada/USA;
- Conference fees;
- Dependent care;
- Transcription of interviews and compensation to participants for research interviews;
- Pre-approved moving expenses for research purposes.

3.11.1 Compensating participants for research interviews is allowed. The Scholar must keep proof of payment, i.e., a letter signed by the participant that includes the fee, the name of the person, why the person was compensated and whether the payment was in cash or in kind, for verification purposes.

3.11.2 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 purposes.

3.11.3 When pre-authorized by the Foundation, moving expenses for research purposes may be reimbursed. The doctoral supervisor must provide the Foundation with a letter explaining that the move is essential for the Scholar's research. Original receipts and proof of payment in the Scholar's name must be kept for verification purposes.

3.11.4 If a scholar on 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 scholar's participation in a Public Interaction Program activity, the scholar may use his or her travel and networking allowance to cover the reasonable travel expenses of this child and the third party.

3.11.5 Scholars may use their travel allowance for reasonable dependent care expenses that are incurred as a result of a research trip or travel to a PIP event. The scholar may claim up to

\$35 per day per household with a signed declaration, to a daily maximum of \$75 per household with a receipt. Original receipts must be kept for verification purposes.

### **3.12 Non-admissible expenses**

- 3.12.1 Non-admissible expenses include but are not limited to passport issuance fees, international driving license costs, traffic or parking tickets, fines, fees, interest charges, carbon offset fees, change fees, late fees.
- 3.12.2 Goods and services of a personal nature such as personal hygiene products, beauty products, clothing, or pharmaceutical products cannot be claimed as they are already covered by the incidental expense allowance (see section 3.9).
- 3.12.3 Spouses' or dependents' travel, lodging, or other types of expenses will not be reimbursed by the Foundation, unless the traveller is on approved leave.
- 3.12.4 Any expense deemed inappropriate or excessive will be declined by the Foundation.

### **3.13 Disbursement of travel and research allowance**

#### **3.13.1 Claims for reimbursement (in effect for fellows and mentors; also in effect for scholars until Aug. 31, 2018)**

- 3.13.1.1 Expense claims should be submitted promptly to the Foundation for reimbursement using the Foundation's expense claim form. Exceptional circumstances aside, the Foundation will decline claims including expenses incurred more than two (2) months prior to the date of submission.
- 3.13.1.2 Given that the Foundation's fiscal year end is August 31, expenses incurred between July 31 and August 31 must arrive at the Foundation no later than September 15 to facilitate the annual audit process. Expenses not claimed by that date may be deemed ineligible for reimbursement by the Foundation.
- 3.13.1.3 The traveller 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.
- 3.13.1.4 If the receipts, invoices, and other supporting documents do not provide sufficient information about a particular expense, the traveller must also provide a signed note describing the expense.

#### **3.13.2 Payment schedule of the annual travel allowance (in effect for scholars only beginning on Sept. 1, 2018)**

- 3.13.2.1 Payment Schedule. If the Scholar is in compliance with the terms and conditions set out herein, the Foundation will advance the ATA to the Scholar as follows:
- 1<sup>st</sup> instalment – mid-September up to 40% of ATA
  - 2<sup>nd</sup> instalment – mid-December up to 30% of ATA
  - 3<sup>rd</sup> instalment – mid-May up to 30% of ATA
- 3.13.2.2 The Scholar must submit a financial activity report outlining the ATA – eligible expenses incurred by the Scholar in the preceding trimester, and a budget of ATA – eligible expenses for the forthcoming trimester before receiving the next ATA instalment. Receipts must be submitted with the activity report.
- 3.13.2.3 If the Scholar doesn't spend the amount of ATA advanced in any ATA period, he or she will reimburse the amount not spent within fifteen (15) days following such ATA period, unless the Scholar can justify the use of the amount as part of the next instalment. At the end of the scholarship term, all unused ATA funds must be returned to the Foundation.
- 3.13.2.4 ATA start date. The start date of the first ATA period for a Scholar enrolled in an approved full-time doctoral program starting in the fall is triggered when the Foundation has confirmed by email that it is in receipt of the following documents:
- A fully executed original funding agreement; and
  - Any additional documents required in their funding agreement
- 3.13.2.5 The ATA period ends on August 31 of the year following this confirmation. In subsequent years, the ATA period runs from September 1 to August 31.
- 3.13.3 The traveller must be prepared to produce the necessary supporting documents demonstrating that the travel option chosen was the least expensive appropriate option for the trip. The Foundation reserves the right to decline a request for a full reimbursement if the charges incurred prove to be higher than what could have been obtained through the Foundation's travel agency and/or negotiated rates. In those situations, the Foundation will reimburse the traveller for reasonable costs based on receipts and on information obtained from the Foundation's travel agency.
- 3.13.4 The Foundation may ask travellers to present other documents or provide other information to support their claim.
- 3.13.5 Hotel and flight 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).
- 3.13.6 Although the Foundation does not require receipts for per-diem expenses incurred during travel outside of Canada and the United States, we recommend that travellers



keep their original receipts in the event that they are audited by the Canada Revenue Agency.

- 3.13.7 We strongly recommend that travellers keep photocopies of all original documents they submit with their claims or random verifications.

### **3.14 Exchange rate**

- 3.14.1 The exchange rate used to convert foreign currency for business expenses incurred by the travellers 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.

### **3.15 Format of claim and supporting documents (applicable to mentors and fellows, also applicable to scholars until Aug. 31, 2018)**

- 3.15.1 Whenever original receipts are required herein, it is understood that the claims and original documents may be submitted to the Foundation either in print 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.
- 3.15.2 Submitting an electronic claim does not relieve the traveller from the obligation of providing original receipts to the Foundation or to a revenue agency. To that effect, it is recommended that the traveller retain all original documentation for a period of at least six years.

### **3.16 Audits by the Foundation**

- 3.16.1 The Foundation has committed to undertaking systematic audits of a sample or the entirety of the travel claims of its travellers. Travellers should be prepared to provide original receipts and complete information to the Foundation at all times, including in instances where daily allowances were claimed.
- 3.16.2 When audited, the travellers are expected to fully cooperate with the Foundation to provide the information requested in a timely fashion.

## **4. DISTRIBUTION OF THIS POLICY**

This policy applies to business travel undertaken with Foundation authorization: for activities related to a scholarship, mentorship, or fellowship awarded by the Foundation, such as learning, research and research dissemination activities or participation in events organized for or by the Foundation; and for social and professional activities undertaken for the Foundation, including representation and outreach activities.

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 1<sup>st</sup>. An up-to-date version of this document is available on the Foundation's website at [www.trudeaufoundation.ca](http://www.trudeaufoundation.ca).

## **E. 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 Policy.

Last updated: 08-24-2018

**APPENDIX A**  
**PER-KILOMETRE RATE**

**Effective 1 April 2018**

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>
Alberta .....	46.5
British Columbia .....	51.5
Manitoba .....	49.0
New Brunswick .....	52.0
Newfoundland and Labrador .....	56.0
North West Territories .....	61.0
Nova Scotia .....	51.5
Nunavut .....	59.0
Ontario .....	57.5
Prince Edward Island.....	50.5
Québec .....	52.0
Saskatchewan .....	48.5
Yukon .....	62.0

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.

**ANNEXE B**  
**PER DIEM ALLOWANCES \***

**In Canadian dollars (taxes included)**

**Effective 1 April 2018**

<b>Allowance for individual non-commercial accommodations .....</b>	<b>\$50.00</b>
Breakfast .....	\$19.45
Lunch .....	\$19.20
Dinner .....	\$48.15
<b>Total meal allowance .....</b>	<b>\$86.80</b>
Incidental expenses .....	\$17.30
<b>Total per diem allowance (meals and incidentals) .....</b>	<b>\$104.10</b>

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 in other countries [www.njc-cnm.gc.ca](http://www.njc-cnm.gc.ca).

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

**VP Travel**

Isabelle Serra  
Business travel advisor  
[PETFbooking@vptravel.ca](mailto:PETFbooking@vptravel.ca)

355 Ste-Catherine St. W, suite 601  
Montréal, Quebec H3B 1A5  
[www.groupevoyagesvp.ca](http://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 Traveller 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)	

## Traveller Profile

### 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>Frequent flyer number</b>	
<b>Frequent flyer number</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>Insurance 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: \_\_\_\_\_