

**MEMORANDUM OF AGREEMENT** made as of the ■ day of July, 2015 (the “**Funding Agreement**”)

Between: **LA FONDATION PIERRE ELLIOTT TRUDEAU /  
THE PIERRE ELLIOTT TRUDEAU FOUNDATION**

(herein referred to as the “**Foundation**”)

AND: ■

(herein referred to as the “**Scholar**”)

**WHEREAS** the Foundation annually awards scholarships of a total value of up to \$180,000 over three years to Canadian and international doctoral students in the fields of humanities and human sciences of direct relevance to the future of Canada;

**WHEREAS** the Scholarship is available for research, travel, networking within and beyond the Foundation’s community, knowledge dissemination, attendance at the Foundation’s annual events and tuition at an Eligible Institution or Foreign Eligible Institution, in themes of study identified by the Foundation – namely, human rights and dignity, responsible citizenship, Canada in the world and people and their natural environment – to improve understanding of the most fundamental and pressing social and public policy questions facing Canada in a changing world;

**WHEREAS** the Scholar has demonstrated strong leadership potential in the area of ■ and the Scholar’s file has been reviewed by an independent file review committee of eminent researchers and intellectuals and following which the Scholar has been approved by the Foundation’s Board of Directors to be awarded a Scholarship, the whole as more fully herein set forth;

**WHEREAS** once the Scholarship terminates, the Scholar will be invited to join the Trudeau Foundation Society, the Foundation’s association of alumni Scholars, Mentors and Fellows. The Scholar will also be invited to continue to attend Public Interaction Program events and to contribute to the Foundation’s areas of inquiry.

**NOW THEREFORE THIS AGREEMENT WITNESSETH:**

**1. THE SCHOLARSHIP**

- 1.1 The Foundation hereby grants to the Scholar a Scholarship in the aggregate amount of one hundred and eighty thousand dollars (\$180,000) (the “**Scholarship**”) as set out in Section 3.
- 1.2 The Scholarship shall be paid to the Scholar in accordance with the payment schedule set forth in Section 4.

**2. DUTIES AND OBLIGATIONS OF THE SCHOLAR**

The Scholar agrees that throughout the term of the Scholarship, the Scholar shall comply with the terms of this Agreement and further agrees that:

- 2.1 The Scholar will maintain a standard of ethical conduct that will uphold the good reputation of the Trudeau Scholarship Program and the Foundation;
- 2.2 The Scholar will comply with all Foundation policies, some of which are annexed hereto and all of which are available at the Foundation’s website at [www.trudeaufoundation.ca](http://www.trudeaufoundation.ca);
- 2.3 The Scholar will actively participate in the Foundation’s Public Interaction Program (“**PIP**”), an innovative network of academic interchange and public engagement that seeks to build literacy, grow the capacity to engage others around issues of importance for Canada and the world, generate ideas about these issues and support the search for practical and innovative solutions. At a minimum, active participation in the PIP signifies that, for each of the years that s/he is a Scholar, the Scholar will attend the Annual Foundation Conference, the Mentor-Scholar Retreat and the Summer Institute in their entirety. In the event of exceptional circumstances, such as illness or a death in the family, the Foundation may excuse the Scholar from attending these events;
- 2.4 Each year, the Foundation appoints Trudeau mentors (the “**Mentors**”) active in business, politics, community development, arts and culture, philanthropy, public service, journalism and other areas to help Scholars to integrate a public policy perspective into the Scholar’s research and better communicate the Scholar’s findings to different audiences. The Foundation matches Mentors and Scholars in light of the Scholar’s interests, profile and experience; Mentors help Scholars transition from the academic to the practical world. The Scholar will develop a relationship with the Scholar’s Mentor by communicating with the Mentor regularly, initiating and accepting invitations to and from the Mentor and looking for ways to learn from the Mentor in general. The Scholar will also actively reach out to other

Mentors and members of the Foundation's network whose experience or interests might inform the Scholar's work;

- 2.5 From time to time, the Foundation will identify targeted areas of inquiry around which it will concentrate some of the expertise of its community and orient its PIP and its partnerships. The Scholar will contribute to one or more of the Foundation's areas of inquiry by offering to collaborate in an existing project, by proposing a project of the Scholar's own, or by otherwise helping to advance the objectives of the Foundation's areas-of-inquiry initiative;
- 2.6 The Scholar will work with at least two (2) recipients of a Trudeau Fellowship who are affiliated to Eligible Institutions outside the province to which the Scholar is affiliated, or who are affiliated to Foreign Eligible Institutions.

The Scholar's failure to adhere to the stipulations set out in this Section 2 may result in the suspension or termination of the Scholarship and of the payments referred to in this Agreement.

### **3. SCHOLARSHIP PAYMENT**

- 3.1 The Scholarship is tenable for three years. A scholarship may be available for a fourth year, under the terms and conditions set out in Schedules A and B and subject to application being made therefor during the third year. The fourth-year scholarship is designed to allow the Scholar to write a dissertation or disseminate the Scholar's research; the financial conditions for the dissertation or dissemination scholarship depend on the budget available for a given cohort.
- 3.2 To be eligible for funding, a Scholar must be enrolled full-time in an Eligible Institution in a doctoral program approved by the Foundation.
- 3.3 The Scholar cannot benefit from a Scholarship while working full-time.
- 3.4 The Scholarship is comprised of two distinct financial categories:
  - 3.4.1 **The Stipend.** A stipend (the "**Stipend**") of up to \$40,000 per year intended to cover the cost of tuition, reasonable living expenses as well as training and development.
    - 3.4.1.1 **Adjusted Stipend:** If the Scholar holds another scholarship or fellowship and if the total value of those outside awards exceeds \$10,000, the Foundation will deduct from the Stipend the amount of the cumulative awards that exceeds \$10,000. Upon making the initial application for the Scholarship and on or prior to August 1 of each calendar year thereafter during the term of the Scholarship, the Scholar will submit to the Foundation a written

declaration as to the scholarship or fellowship awards to which the Scholar is entitled in respect of the forthcoming academic year.

- 3.4.2 **The Annual Travel and Networking Allowance** (the “ATA”). A travel allowance of up to \$20,000 per year available to support research-related travel approved by the Foundation and to cover networking expenses associated with the PIP. Unused travel funds at the end of the Scholarship will be available for the Scholars’ participation in subsequent PIP events as per Section 5.2.3.
- 3.5 **Time Spent Away From the Home University.** During the tenure of the Scholarship, the Scholar will conduct research or Studies at at least one Eligible Institution at a location away from the Scholar’s home university and outside the province in which that university is located or one Foreign Eligible Institution. An “**Eligible Institution**” means a university in Canada that grants doctorate degrees and a “**Foreign Eligible Institution**” means a university outside Canada that grants doctorate degrees and that is determined by the Foundation to be a Foreign Eligible Institution. “**Studies**” include activities such as doing joint research, giving a conference or attending a seminar. Time spent outside of Canada must be related directly to the Scholar’s research, Studies or a PIP event. Where the Scholar who is registered in a full-time doctoral program at an institution in Canada undertakes approved research work outside Canada, Foundation support for such work is limited to a cumulative total of up to four months per academic year, unless otherwise authorized in advance by the Foundation. This timeframe also applies to any joint program with a university other than the home university. The ATA may be used, in part, for such research, Studies or PIP events.

#### 4. PAYMENT SCHEDULE OF THE STIPEND

- 4.1 **Payment Schedule.** If the Scholar is in compliance with the terms and conditions set out herein, the Foundation will disburse the Stipend (adjusted pursuant to the provisions of Section 3.4.1.1) to the Scholar as follows:
- 1<sup>st</sup> instalment – mid-August                      40% of adjusted Stipend
  - 2<sup>nd</sup> instalment – mid-December                      30% of adjusted Stipend
  - 3<sup>rd</sup> instalment – mid-May                      30% of adjusted Stipend
- 4.2 Each semester, the Scholar must submit proof of full-time enrolment in a doctoral program (letter from the department or official transcript).
- 4.3 The above payment schedule applies to the Scholar who commences his or her approved full-time doctoral program in the autumn term. The payment schedule will be adjusted if the Scholar starts at a later date.

- 4.4 It is possible for the Scholar to interrupt the Scholarship for up to one year. The leave of absence must be for one of the following reasons: parental leave, death of a close relation, or serious illness and is subject to approval by the Foundation. The Scholar must provide relevant documentation when requesting a leave.

## 5. REIMBURSEMENT OF THE ATA

- 5.1 **Who submits an expense claim.** Only the Scholar may submit an expense claim. With the exception of advances authorized under Section 5.2.9, expenses must be borne by the Scholar, with reimbursement requested subsequently.

### 5.2 **Eligible expenses.**

- 5.2.1 To be eligible, 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;
- Pre-approved research material;
- Any PIP event to which a Scholar is invited by the Foundation, including:
  - Annual
  - Foundation Conferences
  - Trudeau Summer Institutes
  - Trudeau Lectures
  - Trudeau Scholar-Mentor Retreat
  - Trudeau Scholars' Workshops
  - Any other PIP event organized in partnership with the Foundation
  - A pre-approved language training program in Canada. To be eligible for fee reimbursement, the Scholar must enroll in a recognized language school and must provide the Foundation with a proof of completion for the private or group language courses (transcript, attestation, etc.)
- The pre-approved 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;
- Pre-approved per diems for stay outside Canada/USA;
- Pre-approved conference fees;
- Pre-approved dependent care;
- Research material for research purposes;
- Pre-approved transcription of interviews and compensation to participants for research interviews;

- Pre-approved moving expenses for research purposes.
- 5.2.2 If a Scholar has already exhausted the annual ATA when invited to participate in a PIP event, the ATA allocable to the next academic year can be used to cover these expenses. In addition, unused annual ATA in one academic year can be added to the ATA of the next academic year.
- 5.2.3 Unused travel funds at the end of the Scholarship will be available for the Scholar's participation in subsequent PIP events.
- 5.2.4 Other expenses are not eligible unless pre-approved.
- 5.2.5 **Dependent care.** The Foundation will reimburse pre-authorized 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 or up to a daily maximum of \$75 per household with a receipt. Original receipts must be submitted. Any amounts paid on account of expenses incurred while the Scholar is on approved leave will be deducted from the ATA otherwise available to the Scholar in the first academic year following the approved leave.
- 5.2.6 **Research material.** The ATA is made available primarily for travel and networking purposes. The Foundation encourages the Scholar to find other sources of funding to cover computer-related costs. If other funding is not available, the Foundation will accommodate the Scholar as follows:
- 5.2.6.1 The purchase of a pre-approved computer or laptop, printer, research-related software, video camera or digital camera or recorder for research purposes is permissible once during the term of the Scholarship. The desktop or laptop computer, a printer, a video camera, a digital camera or a recorder, if required, must be purchased no later than the beginning of the third year of the Scholarship.
  - 5.2.6.2 No requests will be accepted in the last year of the Scholarship, except for research-related software, which may be reimbursed as needed. An original invoice in the Scholar's name and proof of payment by the Scholar are required.
  - 5.2.6.3 Ineligible fees and expenses include:
    - Other equipment such as a smartphone
    - Basic word processing software
    - Office supplies (e.g., ink cartridges, paper)
    - USB keys, batteries
    - Computer desk, chair and computer case
    - Extended computer warranty (more than one year)

5.2.7 **Participant fees and cost of transcribing interviews.** When pre-authorized by the Foundation, interview transcription expenses related to the Scholar's research may be reimbursed. Original receipts must be submitted.

5.2.7.1 Compensating participants for research interviews is allowed. The Scholar must provide 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. In addition, the doctoral supervisor must provide the Foundation with a letter confirming that the fee is appropriate.

5.2.7.2 If a gift is given in lieu of cash, the Scholar must provide the original invoice for the gift in addition to a signed letter from the participant acknowledging receipt.

5.2.8 **Moving expenses for research purposes.** When pre-authorized by the Foundation, moving expenses 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 are required.

5.2.9 **Requesting an advance.** When required, advances may be requested for estimated travel expenses of \$1,500 or more. To request an advance, a Scholar must describe the purpose of the trip, the expected travel dates and an itemized estimate of reimbursable expenses. Advances may only be obtained for expenses that must be paid before a voyage (plane tickets, conference fees, etc.). To request an advance, Scholars must follow the usual procedure for reimbursement of expenses, noting on the Expense Claim Form a reduction in the amount claimed equal to the amount of any outstanding advance(s). Advances are not available for visiting experts. The full travel advance must be reimbursed to the Foundation if the trip is cancelled.

5.3 **When and how to submit an expense claim.** The Scholar must submit the expense claim no later than sixty (60) days after return from the travel to which the expense relates; each claim may relate to more than one trip. Claims may be submitted at any time during the academic year with the exception of the following:

- *Foundation's fiscal year-end:* Given that the Foundation's fiscal year end is August 31, outstanding expenses for the period ending 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.

- *In case of an advance:* The necessary documentation (original receipts, invoices, etc.) related to an advance must be submitted no later than 20 days after the end of the trip for which the Scholar received the advance. If the trip is scheduled close to the Foundation's year-end, i.e., from August 15 to September 15, the Scholar must provide prior to September 15 as many receipts as possible related to the trip.
- 5.3.1 The Scholar should allow more than one month for payment during the summer, the annual audit process (September-October) and the December holidays.
- 5.3.2 All expense claims under the ATA are to be completed using the appropriate Scholars' Expense Claim Forms available on the Foundation's website at [www.trudeaufoundation.ca](http://www.trudeaufoundation.ca). One form is for PIP-related reimbursements, which are non-taxable; the other is for research-related reimbursements, which are taxable.
- 5.4 **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 of this Agreement; and
  - the documents requested in Section 6.1 of this Agreement.
- 5.4.1 The ATA period ends on August 31 of the year following this confirmation. In subsequent years, the ATA runs from September 1 to August 31.
- 5.4.2 These dates will be adjusted forward if the Scholar's program starts other than in the fall.
- 5.5 **Approved leave and PIP participation**
- 5.5.1 The Scholar may interrupt the Scholarship for up to one year. The leave of absence must be for parental leave, the death of a close relation, or serious illness and is subject to approval by the Foundation. The Scholar must provide relevant documentation when requesting a leave.
- 5.5.2 The Scholar on approved leave who wishes to participate in a PIP activity may use the ATA, provided that any amounts expended under such ATA will be deducted from the ATA available to the Scholar for the first academic year following the leave of absence.
- 5.5.3 If the Scholar is on approved leave as described in Section 5.5.1 and if the Scholar must travel with a child under the age of two and must be accompanied by a third person in order to see to the child's needs during the



Scholar's participation in a PIP activity, the Scholar may use the ATA to cover the reasonable travel expenses of this child and the third party.

5.5.4 If the Scholar decides not to pursue his/her doctorate after the approved leave, any amounts used from the ATA during the leave must be reimbursed by the Scholar to the Foundation.

## **5.6 ATA expenses requiring pre-authorization**

The following list summarizes expenses requiring pre-authorization by the Foundation:

- when travel is over seven (7) days for:
  - car rentals (rental fees and reimbursement of fuel)
  - use of a personal vehicle (kilometric rate reimbursement)
  - accommodation
  - per diems for stay outside Canada/USA
- conference fees
- dependent care (e.g., child care)
- expenses of a visiting scholar
- language training in Canada
- purchase of a computer or laptop, printer, research-related software, video camera, digital camera or recorder for research purposes
- participant fees and the cost of transcribing an interview
- moving expenses for research purposes
- participation in a PIP activity during an approved leave
- any expense not described in this agreement.

## **6. REPORTING REQUIREMENTS**

### **6.1 Documentation to be submitted with this Agreement**

The following documents must be sent to the Foundation by the Scholar with a fully executed original of the Funding Agreement:

- a 250-word abstract of the Scholar's doctoral research project;
- a personal contact data sheet, with current contact information and, if known, future contact information (postal address, telephone, including cell phone, fax, email); the Scholar is required to provide the Foundation with an updated personal contact data sheet as the data changes;
- a social insurance number for the preparation of annual tax slips; if the Scholar is not eligible to obtain a social insurance number, the Scholar must provide the Foundation with an individual tax number for non-residents and a letter indicating the Scholar's permanent address (Canada or other country) for income tax purposes at the start-date of the Scholarship;

- proof of citizenship (a photocopy of the passport's personal data page or a photocopy of birth certificate); where applicable, proof of immigration status in Canada (a photocopy of the immigration document);
- confirmation of full-time enrollment in the doctoral program at an Eligible Institution (an original signed letter from the host institution, addressed to the Foundation, stating the name of the Scholar and the expected duration of the program);
- a declaration of all other confirmed or expected financial support to be provided by other scholarships or prizes in the course of the coming academic year and in the course of subsequent academic years; information must be presented by academic year, by specifying the reference period of the external grant (September 1<sup>st</sup> to August 31<sup>st</sup> or May 1<sup>st</sup> to April 30<sup>th</sup>, for instance);
- if the Scholar has a Canadian bank account, a sheet listing banking information, to include the name of the bank, the address, telephone and fax numbers of the branch, the transit code and the account number;
- if the Scholar has a foreign bank account, a sheet providing information necessary to complete a wire transfer and an indication of the wire transfer fee(s) imposed on incoming transfers (Trudeau Scholars coming to Canada may provide Canadian bank account information once they are established in Canada).

6.2 **Mid-Year Report.** When starting an approved full-time doctoral program in the fall term, the Scholar will provide a mid-year summary report on research activities by December 1 of that year. The report must be accompanied by a confirmation of enrollment in the doctoral program, being an original signed letter from the host institution, addressed to the Foundation, stating the name of the Scholar and the expected duration of enrollment in the program. The terms and conditions of the report are set out in Schedule C and are subject to change from time to time.

6.3 **Annual Report and Final Report.** Commencing with the first year of enrollment in a full-time doctoral program and in each year of the term of the Scholarship, a Scholar will provide an annual report by May 1. Each annual report must be accompanied by an official transcript reflecting the results of the Scholar's studies during the academic year. In the second year of funding, the Scholar must ask his or her doctoral supervisor to send directly to the Foundation a brief letter updating the Foundation on the Scholar's doctoral progress, accompanied by a report. The terms and conditions are set out in Schedule D and are subject to change from time to time.

6.3.1 In the final year of funding, the Scholar will send directly to the Foundation a final report by May 1 of such year; the terms and conditions are set out in Schedule E and are subject to change from time to time.

6.3.2 The reporting schedule will be adjusted if the Scholar's program does not begin in the fall. Any deviation from the standard reporting schedule must be pre-approved by the Foundation.

6.4 **Disclosure of financial support from other scholarships or fellowships.** Mid-year and annual reports must include a statement of financial support received from other scholarships or fellowships in any given academic year, as well as confirmed funding for subsequent academic years. The information must be presented by academic year, specifying the period of reference of the external grant (September 1<sup>st</sup> to August 31<sup>st</sup> or May 1<sup>st</sup> to April 30<sup>th</sup>, for instance).

## 7. PUBLIC PROFILE AND COMMUNICATIONS

7.1 The Foundation encourages Foundation community members wishing to disseminate knowledge and share their ideas to use public communications opportunities to educate the public about the Foundation's work.

7.2 Accordingly, the Scholar agrees to use the designation "**Trudeau Scholar**", along with the Scholar's cohort year, in the Scholar's signature blocks and other identification tools for the duration of the Scholarship.

7.3 The Scholar agrees to inform the Foundation promptly in writing of the Scholar's publications, together with any information respecting other activities or events in which the Scholar participates that may be of interest to the Foundation and/or the Foundation community.

7.4 Where possible, the Scholar will specify that statements by the Scholar reflect the Scholar's viewpoint and do not represent those of the Foundation.

7.5 The use of the Pierre Elliott Trudeau Foundation corporate identity, including but not limited to its name, logo, key themes and taglines, is subject to the Foundation's written approval. The Foundation reserves the right to withdraw permission to use the corporate image for any reason.

7.6 The Scholar shall send a hardcover bound copy of his/her doctoral dissertation once final revisions have been approved, after the Scholar's thesis defence, and shall send a copy of the thesis if it is published.

7.7 Other communication tools in the format chosen by the Foundation (for example, abstract, paper, video) can be used to promote the Foundation.

## 8. INSURANCE

Health insurance coverage in the province or country of study is the full responsibility of the Scholar. The Foundation is not responsible for ensuring that the Scholar complies with this requirement.

## 9. PRIVACY

All information collected by the Foundation is subject to the Federal *Personal Information Protection Act* and the *Act Respecting the Protection of Personal Information in the Private Sector* of Quebec. The purpose of these statutes is to protect the privacy of individuals with respect to personal information collected and held by the Foundation. These statutes also provide the Scholar with a right of access to his or her personal information held by the Foundation. For more information, the Scholar is invited to read the Foundation's Privacy Policy available on the Foundation's website at [www.fondationtrudeau.ca/en/about/publications/policies](http://www.fondationtrudeau.ca/en/about/publications/policies).

## 10. RELEASE, DISCHARGE AND INDEMNITY

The Scholar hereby releases and discharges the Foundation, including its officers, employees, agents, directors, governors and members (collectively the "**Foundation Personnel**") from any and all actions, causes of action, claims, debts, losses, damages, costs, suits and liabilities of every nature and kind whatsoever, real or alleged (collectively the "**Claims**"), resulting from, arising out of or relating either directly or indirectly to the Scholarship and/or the activities undertaken by the Scholar pursuant to this Funding Agreement and/or funded in whole or in part by the Scholarship (collectively the "**Scholarship Activities**"). The Scholar hereby agrees to indemnify and hold harmless the Foundation and the Foundation Personnel in respect of any Claims made against or incurred by the Foundation and/or Foundation Personnel and arising from or relating to, directly or indirectly, any Scholarship Activities.

## 11. GENERAL TERMS AND CONDITIONS

- 11.1 The Scholarship is subject to annual confirmation. For the Scholarship to be confirmed, the Scholar must fulfill the duties and obligations set out herein and the Scholar's annual report must demonstrate to the Foundation's satisfaction that the Scholar is in compliance with the Scholarship's eligibility requirements and the Foundation's standards of excellence.
- 11.2 The Scholar grants permission to the Foundation to make public his or her name, photos, research interests, institutional affiliations and similar information.
- 11.3 An Event of Default shall be considered to have occurred in the following circumstances and may result in termination of the Scholarship and the obligation of the Scholar to reimburse all funds disbursed pursuant to this Funding Agreement:
  - (i) the Scholar has submitted false or misleading information to the Foundation or intentionally made a false or misleading representation;
  - (ii) any material term, condition or undertaking in this Agreement on the part of the Scholar is not complied with by the Scholar;

- (iii) the Scholar ceases to be eligible for a Scholarship, as per the provisions of Sections 3.2 and 3.3; or
  - (iv) any of the Scholar's Activities is determined by the Foundation to be unethical or contrary to the values of the Foundation.
- 11.4 Any reference in this Agreement to gender shall include all genders and words importing the singular number only shall include the plural and vice versa.
- 11.5 The division of this Agreement into articles, sections, subsections and other subdivisions and the insertion of headings are for convenience of reference only and shall not affect or be utilized in the construction or interpretation of this Agreement.
- 11.6 Unless expressly stated to the contrary, any references in this Agreement to any rule, regulation, order or policy of the Foundation shall be construed as a reference thereto as enacted at the date hereof and as same may be amended, re-enacted or superseded from time to time.
- 11.7 In this Agreement, references to "hereof", "hereto" and "hereunder" and similar expressions mean and refer to this Agreement taken as whole and not to any particular article, section, subsection or subdivision.
- 11.8 If any provision of this Agreement is determined to be invalid or unenforceable by an arbitrator or a court of competent jurisdiction from which no further appeal lies or is taken, that provision shall be deemed to be severed herefrom and the remaining provisions of this Agreement shall not be affected thereby and shall remain valid and enforceable; provided that in the event that any portion of this Agreement shall have been so determined to be or become invalid or unenforceable, the parties shall negotiate in good faith such changes to this Agreement as will best preserve for the parties the benefits and obligations of such offending portion.
- 11.9 This Agreement may only be amended, modified or supplemented by written agreement signed by each of the parties hereto.
- 11.10 No waiver of any of the provisions of this Agreement by any party shall be deemed to constitute a waiver of such provision by the other party or a waiver by such party of any other provision (whether or not similar); nor shall such waiver constitute a continuing waiver unless otherwise expressly provided in writing duly executed by the party to be bound by such waiver.
- 11.11 This Agreement shall be governed by and interpreted and enforced in accordance with the law of the Province of Quebec and the laws of Canada applicable therein.

- 11.12 This Agreement constitutes the entire agreement between the parties pertaining to the matters contemplated hereby and supersedes all prior agreements, understandings, negotiations and discussions, whether oral or written, of the parties.
- 11.13 The parties will from time to time during the course of this Agreement or upon its expiry and without further consideration execute and deliver such other documents and instruments of clarification, transfer, conveyance and assignment and take such further action as another may reasonably require to effect the activities contemplated thereby or to otherwise advance the objectives of this Agreement.
- 11.14 Any notice, direction or other instrument required or permitted to be given under this Agreement shall be in writing and shall be given by delivering it or by sending it by telecopier or electronic mail addressed:

(v) if to the Foundation at:

The Pierre Elliott Trudeau Foundation  
Attention: The President  
600-1980 Sherbrooke Street West  
Montréal, QC H3H 1E8  
Phone: 514-938-0001  
Fax: 514-938-0046  
Email: mrosenberg@trudeaufoundation.ca

(vi) if to the Scholar at:

■

Any such notice, direction or other instrument given as aforesaid shall be effective upon receipt, unless received on a day which is not a business day. Any party may change its address for notice from time to time by notice given in accordance with the foregoing and any subsequent notice shall be sent to such party at its changed address.

- 11.15 Time shall be the essence of this Agreement.
- 11.16 Each party intends that this Agreement shall not benefit or create any right or cause of action in or on behalf of any person, other than the parties, and no person, other than the parties, shall be entitled to rely on the provisions hereof in any action, suit, proceeding or hearing or other forum.
- 11.17 Nothing contained in this Agreement shall be construed to place the parties in the relationship of agent and principal, master and servant, settlor and trustee, partners or joint venturers and no party shall have any right to obligate or bind the other party in any manner.

- 11.18 All rights, powers and remedies provided under this Agreement or otherwise available in respect thereof at law or in equity shall be cumulative and not alternative and the exercise of any thereof by any party shall not preclude the simultaneous or later exercise of any other such right, power or remedy by such party.
- 11.19 This Agreement may be executed in one or more counterparts, each of which shall be deemed an original and all of which, taken together shall constitute one and the same instrument.
- 11.20 The dates and times by which any party is required to perform any obligation under this Agreement shall be postponed automatically to the extent, for the period of time that such party is prevented from so performing by circumstances beyond its reasonable control. Said circumstances shall include acts of nature, strikes, lockouts, riots, acts of war, epidemics, government regulations imposed after the fact, fire, communications failures, power failure, earthquakes or other disasters.
- 11.21 As the Trudeau Scholarship Program evolves, the Foundation may, from time to time, modify the terms and conditions of this Funding Agreement, with advance notice provided to the Scholars. Upon such modification being made and communicated to the Scholar, this Funding Agreement shall be deemed to have been amended accordingly.

**12. LANGUAGE**

*Les parties ont demandé que cette convention soit rédigée dans la langue anglaise.* (The Parties have requested that this Agreement be drafted in the English language.)

**13. AWARD ACCEPTANCE**

I have read and understood the above Agreement, and I accept the Scholarship under the terms and conditions herein.

For La Fondation Pierre Elliott Trudeau /  
The Pierre Elliott Trudeau Foundation,

Read and accepted,

\_\_\_\_\_  
Morris Rosenberg  
President and Chief Executive Officer

\_\_\_\_\_  
(Scholar Name)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**LIST OF SCHEDULES**

Schedule A – Application Criteria for Thesis – Writing Scholarships Fourth-Year of Funding and Support

Schedule B – Application Criteria for Dissemination Scholarships Fourth-Year of Funding and Support

Schedule C – Mid-Year Summary Report – Guidelines

Schedule D – Annual Report – Guidelines

Schedule E – Final Report – Guidelines

Schedule F – Travel Policy



**SCHEDULE A**  
**APPLICATION CRITERIA FOR THESIS-WRITING SCHOLARSHIPS**  
**FOURTH-YEAR OF FUNDING AND SUPPORT**

The Trudeau Scholarship Program supports doctoral students actively engaged in human sciences and humanities research who are expected to become leading national and international figures. Through its Thesis-Writing Scholarship, the Foundation may offer both financial and non-monetary support to assist Scholars in writing their dissertations and completing their doctorates. As this program is funded with the savings generated by external awards held by the Scholars of a given cohort, the financial conditions for the Thesis-Writing Scholarship may vary. The Foundation also reserves the right not to offer Thesis-Writing Scholarships or to discontinue the Thesis-Writing Scholarship Program without further notice. The financial conditions of the Thesis-Writing Scholarship are more modest than those of the three-year Trudeau Scholarship. An annual travel allowance of up to \$2,000 is provided to allow the Scholar to attend at least one PIP event, including the Summer Institute.

The Thesis-Writing Scholarship's requirements are as follows:

A letter from the Doctoral Supervisor specifying:

- progress toward the successful completion of the doctoral degree program
- academic program requirements yet to be completed (i.e., courses, comprehensive exams, dissertation, etc.)
- expected submission date of the doctoral dissertation
- anticipated date of the dissertation review

The following must also be submitted:

- a letter of support from the Trudeau Mentor
- a summary of the Scholar's involvement in the Foundation community
- comments on the experience of being a Trudeau Scholar
- a detailed working plan for the fourth year
- other anticipated sources of funding for the fourth year

During the period in which the Thesis-Writing Scholarship is in force, the Scholar may interrupt the Scholarship for a one-time leave of absence of up to six months. The Scholar must provide relevant documentation when requesting a leave. Section 5.5 of the Trudeau Scholarship Funding Agreement applies, with the necessary modifications to the leave. In addition, if a Scholar's doctorate is not sufficiently advanced to make use of the Thesis-Writing Scholarship, the Scholar may delay the commencement of the Scholarship for a maximum period of one term. No funds shall be granted by the Foundation during the delay period.

The granting of a Thesis-Writing Scholarship is not automatic and the number of such scholarships is limited. For this reason, Doctoral Supervisors, Mentors and Scholars are

welcome to add any comments that will help the Foundation better evaluate whether continued funding and support will enable the Scholar to both complete his or her thesis and successfully obtain a doctoral degree. It is understood that during the course of the Thesis-Writing Scholarship, the Scholars will abstain from taking on any function that would delay the completion of the doctoral program, such as working as a lecturer or research assistant or attending conferences where they are not making a presentation, except for events organized by the Foundation. The Scholars are also encouraged to enroll in a writing seminar, through their university, before the Thesis-Writing Scholarship commences, if they think it is necessary.

Send the application documents by mail or courier directly to Josée St-Martin, the Foundation's Scholarships Director. Scholars who wish to apply for a Thesis-Writing Scholarship must submit the required documents no later than December 1 of the third year of the Trudeau Scholarship or as previously agreed with the Scholarships Director. The Foundation will make a final decision no later than four months after receiving the documents. This decision is final.

*Terms and conditions set out in Schedule A of the Funding Agreement are subject to change.*

**SCHEDULE B**  
**APPLICATION CRITERIA FOR DISSEMINATION SCHOLARSHIPS**  
**FOURTH-YEAR OF FUNDING AND SUPPORT**

The goal of the Dissemination Scholarship is to allow Scholars to publish the results of their doctoral research. As this program is funded with the savings generated by external awards held by the Scholars of a given cohort, the financial conditions for the Dissemination Scholarship may vary. The Foundation reserves the right not to offer Dissemination Scholarships or to discontinue the Dissemination Scholarship Program without further notice. The financial conditions of the Dissemination Scholarship are more modest than those of the three-year Trudeau Scholarship. The program provides a networking and publishing allowance of up to \$15,000 to cover the following expenses:

- participation in symposia and scientific activities
- participation in publishing and research dissemination activities
- funds to hire a research assistant, translator or professional editor
- membership fees for a professional order or association
- document photocopying and layout

Selection will be based on the following components:

A letter from the Scholar's Doctoral Supervisor specifying:

- progress made to date toward obtaining the doctoral degree
- outstanding academic program requirements
- expected submission date of the doctoral dissertation
- expected date of the dissertation review
- if the doctoral dissertation has been submitted, the value of pursuing dissemination activities

Dissemination Project:

- a detailed description of the dissemination project including the reason the Scholar wishes to disseminate his or her research
- a list of granting organizations to which the Scholar has submitted a request for funding
- one or more letters of intent presented to the institutions where the Scholar wishes to undertake the dissemination OR a letter of admission from the institution at which the Scholar will undertake the dissemination work
- a detailed description of the project involving the dissemination of ideas and the transfer of knowledge through networking and publishing
- the number of days required to support the publication process

The following must also be submitted:

- a summary of the Scholar's involvement in the Foundation's community
- comments on the experience of being a Trudeau Scholar

- a letter of support from the Trudeau Mentor

During the period in which the Dissemination Scholarship is in force, the Scholar may interrupt the Scholarship for a one-time leave of absence of up to six months. The Scholar must provide relevant documentation when requesting a leave. Section 5.5 of the Trudeau Scholarship Funding Agreement applies, with the necessary modifications, to the leave. The granting of a Dissemination Scholarship is not automatic and the number of such scholarships is limited. For this reason, Doctoral Supervisors and Scholars are welcome to add any comments that will help the Foundation better evaluate whether continued funding and support will enable the Scholar to successfully complete the dissemination project.

Send application documents by mail or courier directly to Josée St-Martin, the Foundation's Scholarships Director. Scholars who wish to apply for a Dissemination Scholarship must submit the required documents no later than December 1 of the third year of the Trudeau Scholarship or as previously agreed with the Scholarships Director. The Foundation will make a final decision no later than four months after receiving the application documents. This decision is final.

*Terms and conditions set out in Schedule B of the Funding Agreement are subject to change.*

**SCHEDULE C  
MID-YEAR SUMMARY REPORT – GUIDELINES**

Please provide the following information by email in an attached Word Document by 1 December:

**Contact Information**

- any update to your contact information (e-mail, telephone/fax, work/home addresses)
- the contact information of your doctoral research supervisor (name, title, e-mail, telephone/fax, address)

**Research and Networking Activities since the acceptance of your Funding Agreement**

- a narrative update on your research (approximately 250 - 500 words), including a brief statement of your plans for the remainder of the academic year
- a list in point form of publications, courses taught (brief description, number of hours per week, etc.), presentations or attendance at conferences, extra-curricular activities, or other such information (if possible, attach electronic versions of publications or provide Internet links)
- describe your experience with the Mentorship program, including:
  - a) number and types of interactions with your assigned Trudeau Mentor (rank from 1 (poor) to 5 (excellent) and text description)
  - b) number and types of interactions with other Trudeau Mentors (rank from 1 (poor) to 5 (excellent) and text description)
  - c) provide you assessment of the value of the Mentorship Program (rank from 1 (poor) to 5 (excellent) and text description)
- a list of meetings with individuals or organizations that have been facilitated by the use of your Annual Travel Allowance or other Foundation resources

**Spending forecast**

- Your assessment of the ATA sums required over the next:
  - three (3) months
  - six (6) months and
  - twelve (12) months

**Other Scholarships/Awards since the acceptance of your Funding Agreement**

- an update on scholarships or prizes that have been received, are confirmed or expected

**Online Profile & Media since the acceptance of your Funding Agreement**

- confirmation that your profile on the Foundation website is satisfactory; please specify any revisions, if necessary
- media coverage with respect to your research or the awarding of your Trudeau Scholarship

**Feedback**

- comments or suggestions on the Scholarships Program or other Foundation initiatives are welcome at all times

*Terms and conditions set out in Schedule C of the Funding Agreement are subject to change.*

## SCHEDULE D ANNUAL REPORT – GUIDELINES

Please provide the following by 1 May:

### **Confirmation of Doctoral Program Enrolment**

- Confirmation of enrolment in your doctoral program (an original signed letter from your institution, addressed to the Foundation, stating your name and the expected duration of enrolment in the doctoral program)

### **Contact Information (email, telephone/fax, work/home addresses)**

- An update, if necessary, of your contact information
- An update, if necessary, of your doctoral research supervisor's contact information

### **Research and Networking Activities since your Mid-Year Summary Report**

- A narrative update on your research (approximately 500 to 1000 words), with a brief statement of your plans for the next academic year
- A list in point form of publications, courses taught (brief description, number of hours per week, etc.), presentations or attendance at conferences, extra-curricular activities, or other such information (if possible, attach electronic versions of publications or provide Internet)
- Your involvement to date in the Foundation Community and your plans for future involvement, and more specifically:
  - a) your role in the summer institute
  - b) your role in the Annual Foundation Conference
  - c) your participation in the targeted areas of inquiry
  - d) your participation in the Trudeau projects of one or more of the Trudeau Fellows
  - e) your role in other Foundation events
  - f) your plans for involvement over the next year
- describe your experience with the Mentorship program, including:
  - a) number and types of interactions with your assigned Trudeau Mentor (rank from 1 (poor) to 5 (excellent) and text description)
  - b) number and types of interactions with other Trudeau Mentors (rank from 1 (poor) to 5 (excellent) and text description)
  - c) provide your assessment of the value of the Mentorship Program (rank from 1 (poor) to 5 (excellent) and text description)
- A list of meetings with individuals or organizations that have been facilitated by the use of your Annual Travel Allowance or other Foundation resources
- Information on your contribution to one of the Foundation's area-of-inquiry initiatives

**Spending forecast**

- Your assessment of the ATA sums required over the next:
  - three (3) months
  - six (6) months and
  - twelve (12) months

**Other Scholarships/Awards since your Mid-Year Summary Report**

- An update on scholarships or prizes that have been received, are confirmed or expected

**Online Profiles & Media since your Mid-Year Summary Report**

- Confirmation that your profile on the Foundation website is satisfactory; please provide revisions, if necessary
- Media coverage with respect to your research or the awarding of your Scholarship

**Feedback**

- Comments or suggestions on the Scholarships Program or other Foundation initiatives are welcome at all times

*Terms and conditions set out in Schedule D of the Funding Agreement are subject to change.*



## SCHEDULE E FINAL REPORT – GUIDELINES

Please answer the following questions and provide the following documents:

### Questions

- If you have completed your doctoral program, what are your future projects? If not, when do you expect to obtain your doctorate? Have your career plans changed since receiving the Scholarship?
- What does the Scholarship represent for you? What have you gained from being a member of the Foundation community?
- Have you connected with other Mentors, Fellows or Scholars during your Scholarship? If so, how was the experience?
- How did your Mentor help you during your doctoral studies? Have you kept in touch with your mentor?
- Do you think that you would have been able to complete your doctoral studies without the Foundation's financial support?
- How did the annual travel allowance help you with your research? Did it help you with other activities (for example perfecting a language)?
- How can the Foundation improve its programs?
- How did you learn of the existence of the Trudeau Scholarship? Do others approach you about your experience as a Scholar?
- Please provide us with other comments and/or suggestions as you see fit.

### Profile

To reflect your new up-coming alumnus/alumna status, we would like to modify your profile on the Foundation's website. Therefore, we ask that you write a 150-300 word statement to sum up your experience as a Scholar, in order to show the role it played in your research, as well as a 150-300 word biography.

### Documents to send to the Foundation once you have obtained your PhD

- A hardcover bound copy of your dissertation
- A summary (up to 750 words) of your dissertation for publication on the Foundation's website

*Terms and conditions set out in Schedule E of the Funding Agreement are subject to change.*

## SCHEDULE F TRAVEL 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 scholars and 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.

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 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.
- 3.2.2 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.
- 3.2.3 The Foundation may authorize business-class travel for trips over nine hours long. The traveller must request authorization prior to purchasing his or her ticket and must justify the reasons for his or her request. The duration of the trip is calculated based on flight departure and arrival time.
- 3.2.4 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.
- 3.2.5 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.
- 3.2.6 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.
- 3.2.7 Boarding passes must be kept and submitted with the expense claim, 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 and submitted with the expense claim, along with the train itinerary and receipt, for verification purposes. Electronic boarding passes are accepted.

### **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, unless prior authorization is obtained from the Foundation.
  - 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.
- 3.5.4 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 submitted with the claim.

### 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 submitted with the claim.

## 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 submitted with the claim.

## 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 a standard hotel room for a maximum of seven days, unless they have authorization to stay for a longer period.

3.7.3 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.

3.7.4 The cost of non-commercial accommodations (for example, a boarding house or apartment rental) for a period longer than seven days will be reimbursed if prior

authorization is obtained from the Foundation. Original receipts must be submitted with the claim.

### **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 submitted with the claim. 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 Upon presentation of detailed original receipts, telephone calls or internet connections for work purposes will be reimbursed to the traveller.

- 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.
- 3.10.4 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.
- 3.10.5 For scholars, the Foundation will reimburse pre-authorized 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 submitted.

### **3.11 Non-admissible expenses**

- 3.11.1 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.
- 3.11.2 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).
- 3.11.3 Spouses' or dependents' travel, lodging, or other types of expenses will not be reimbursed by the Foundation, unless the traveller is on approved leave and such expenses have been pre-approved by the Foundation.
- 3.11.4 Any expense deemed inappropriate or excessive will be declined by the Foundation.

### **3.12 Claims for reimbursement**

- 3.12.1 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.
- 3.12.2 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.

- 3.12.3 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.
- 3.12.4 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.
- 3.12.5 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.
- 3.12.6 The Foundation may ask travellers to present other documents or provide other information to support their claim.
- 3.12.7 Hotel and flight reservation confirmations are not considered to provide proof of payment. Other documents must be submitted (for example, a hotel account statement, a credit card receipt or a credit card statement).
- 3.12.8 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.
- 3.12.9 We strongly recommend that travellers keep photocopies of all original documents they submit with their claims.
- 3.12.10 Except during peak periods such as the financial year-end and the calendar year-end, when processing times could be longer, the Foundation undertakes to process claims for reimbursement within four (4) weeks of receiving a complete claim.

### **3.13 Exchange rate**

- 3.13.1 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.



### **3.14 Format of claim and supporting documents**

- 3.14.1 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.
- 3.14.2 Submitting an electronic claim does not relieve the traveller from the obligation of providing original receipts to the Foundation or to a revenue agency.

### **3.15 Audits by the Foundation**

- 3.15.1 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 time, including in instances where daily allowances were claimed.
- 3.15.2 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. A copy will also be distributed to each member when the policy is updated from time to time. 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: 16-06-2015

**APPENDIX A  
PER-KILOMETRE RATE**

**Effective 1 May 2015**

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 .....	42.5
British Columbia .....	46.5
Manitoba .....	45.0
New Brunswick .....	47.0
Newfoundland and Labrador .....	50.0
North West Territories .....	59.5
Nova Scotia .....	48.0
Nunavut .....	61.0
Ontario .....	53.5
Prince Edward Island .....	47.0
Quebec .....	49.0
Saskatchewan .....	44.5
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.

**APPENDIX B  
PER DIEM ALLOWANCES \***

**Effective 1 May 2015**

**In Canadian dollars (taxes included)**

<b>Allowance for individual non-commercial accommodations .....</b>	<b>\$50.00</b>
Breakfast.....	\$16.00
Lunch .....	\$16.60
Dinner .....	\$42.80
<b>Total meal allowance .....</b>	<b>\$75.40</b>
Incidental expenses.....	\$17.30
<b>Total per diem allowance (meals and incidentals).....</b>	<b>\$92.70</b>

These rates are subject to change from time to time.

---

\* For travel in Canada and the US.  
For per diem allowances for other countries, the Foundation generally applies the Government of Canada's National Joint Council guidelines. Contact Foundation staff for more information.