

## **The Pierre Elliott Trudeau Foundation Trudeau Foundation Fellowship User Guidelines 2013-2014**

### **Introduction**

The Trudeau fellowship is given in recognition of career contributions of international pre-eminence as well as academic and professional excellence. The fellowship is not a research grant – rather, it recognizes individuals who have set themselves apart through their research activities, creativity and social commitment. Each Trudeau fellowship has a total value of \$225,000.

Trudeau fellows enjoy extensive freedom in their use of the funds they are given, and the Foundation does not require them to make a prior commitment to undertake any specific projects or programs of action. The only important criteria are the excellence of the candidate's record and his or her moral and intellectual qualities. The fellows are encouraged to communicate their ideas and works broadly, and the Foundation supports all efforts in this regard.

Trudeau fellowships encompass far more than money. By meeting Trudeau fellows, mentors and scholars, the fellows join a growing community of researchers and creators involved in an impressive diversity of fields. They have access to a variety of public events organized by the Foundation to disseminate the results of their work and share their ideas with the top experts in the country and around the world. Once during the period of the fellowship, the fellows speak publicly during a Trudeau Lecture about the motivation behind their vocation. They discuss their research and their role as public intellectuals. This original Trudeau Lecture is published in the *Trudeau Foundation Papers*. In accordance with our Public Interaction Program policy, fellows may organize their own events with additional support from the Foundation.

The following guidelines are designed to help Trudeau fellows make acceptable use of their research and public engagement allowance. These guidelines provide a framework for the management of the fellowship funds and help Trudeau fellows and university administrators to establish fair, reasonable and transparent practices.

The Foundation expects the following:

1. The research and public engagement allowance must be used effectively and economically, and the expenses must be essential for the fellow's research activities, creativity and social commitment.
2. Participation in Trudeau Foundation events and exchanges with other Trudeau community members are an essential aspect of the fellowship. Trudeau fellows are expected to make every effort to attend these functions.
3. Fellowships funds are tenable for a maximum of four (4) years. Unused funds may be transferred to the next fiscal year during the first three years. At the end of the fourth year, all unused funds must be returned to the Foundation.

4. The Foundation recognizes five categories for the purposes of the administration of the fellowship (professional development; travel and subsistence; computer-electronic communications and supplies; knowledge dissemination and services and miscellaneous; see further). With the written permission of the Foundation, and following a motivated request from the fellow, transfers from one category to another are possible.

5. As stipulated in § 3.1 (V) of the Memorandum of Agreement, the university is permitted annually to charge to the Fellowship administration costs not exceeding 15% of the fellowship amount received that year.

The Pierre Elliott Trudeau Foundation expects the fellow to clearly mention the Trudeau fellowship's contributions to his or her work, and to and identifies himself or herself as a Trudeau fellow in his publications and so forth.

The list of examples below is not exhaustive. Fellows are encouraged to communicate with their university administrator should questions arise.

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

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

#### **Eligible professional development expenses**

- Salaries, stipends, and related federal, provincial and institutional non-discretionary benefits for research work performed by research personnel (e.g., students, research associates, technicians, etc.).
- The rates of pay for research associates, research assistants and technicians shall be in accordance with the salary scale of the institution concerned.
- A maximum salary/stipend of \$10,000 per annum for postdoctoral fellows from fellowship funds. The post-doctoral research must be related to the overall perspectives of the fellowship.
- Salaries to postdoctoral fellows are limited to two (2) years' support from the Foundation fellowship funds.

#### **Other eligible professional development expenses**

- Consulting fees.
- Fees paid to research subjects, such as modest incentives for participation, where ethically acceptable.
- Subcontract costs.
- Clerical salaries directly related to dissemination activities, including manuscript preparation.
- Reasonable honoraria for guest lecturers.

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

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

### **Travel and Subsistence Costs Up to \$30,000 per mandate**

The Foundation deems it necessary and desirable for the members of the Trudeau community to travel, both across the country and around the world, in the name of research, learning, dissemination of ideas, and networking, as well as to spread the influence of the members and enhance the Foundation's visibility. The Foundation has adopted a travel policy, which can be consulted at [www.trudeaufoundation.ca/about/policies](http://www.trudeaufoundation.ca/about/policies). The travel policy and travel procedures clarify and standardize the procedures related to travel expenses covered by the Foundation. Complementing the travel policy, other types of eligible expenses for Trudeau fellows are listed below.

#### **Other types of eligible travel expenses**

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

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

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

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

Purchases of supplies, equipment, computer equipment and electronic communications materials must be made during **the first 24 months** of the fellowship and must be for the individual use of the Fellow. Purchases should directly contribute to the fellow's research accomplished during his or her Trudeau fellowship. Laboratory equipment unrelated to the individual needs of the fellow is not eligible.

#### **Eligible expenses**

- Research equipment and supplies.
- Transportation costs for purchased equipment.
- Brokerage and customs charges for the importation of equipment and supplies.
- Maintenance and operating costs of equipment in direct relation to the fellowship.
- Computers, modems, and other hardware and software required for the fellow's individual use as Trudeau fellowship recipient.
- Cellular phones and personal digital assistants (e.g., PDA, BlackBerry, Palm Pilots, Pocket PC) when they are necessary for data collection, with adequate justification.

### **Non-eligible expenses**

- Laboratory equipment unrelated to the individual needs of the fellow.
- Purchases made in the last 12 months of the fellowship.
- Insurance costs for equipment, research vehicles.
- Costs of the construction, renovation or rental of laboratories or supporting facilities.
- Standard monthly connection or rental costs of telephones.
- Connection or installation of lines (telephone or other links).
- Voice mail.
- Library acquisitions, computer and other information services provided to all members of an Institution.
- Cellular phone or personal digital assistants (e.g., PDA, BlackBerry, Palm Pilot, Pocket PC) rental or purchase, including service plans, long distance or local charges, unless they are necessary for data collection.

### **Knowledge Dissemination Up to \$35,000 per mandate**

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

#### **Eligible expenses**

- Organization of networking events and conferences in direct relation with the objectives of the fellowship, including reasonable honoraria for invited conference speakers, hospitality, travel and networking expenses.
- Costs of holding a workshop or seminar directly related to the objectives of the fellowship, including reasonable hospitality expenses.
- Costs of developing web-based information including website maintenance fees.
- Costs associated with the dissemination of findings, i.e., through traditional venues as well as videos, CD-ROMs, etc.
- Dissemination of research results, such as translation, with a maximum of \$10,000 per year.
- Page charges for articles published, including costs associated with ensuring open access to the findings (e.g., costs of publishing in an open access journal or making a journal article open access).
- Costs of preparing a research manuscript for publication.
- Costs associated with the publication of books with a maximum of \$10,000 per publication and per year.
- Media training.

### **Services and Miscellaneous Expenses Up to \$20,000 per mandate**

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

#### **Eligible expenses**

- Costs for the purchase of books or periodicals, specialized office supplies, computing equipment and information services not formally provided by the Institution to all its academic and research staff.

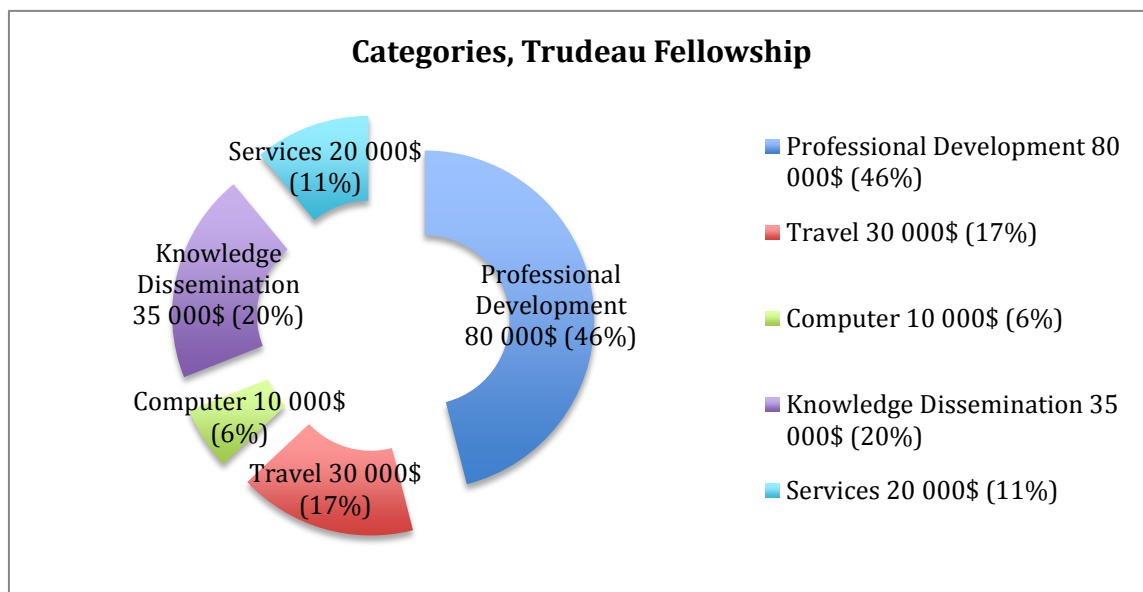
- Reasonable hospitality costs for networking purposes in direct relation with the objectives of the fellowship.
- Costs involved in the preparation of teaching materials.
- Costs related to professional training or development, such as computer and language training in research-related languages.
- Costs of membership in professional associations or scientific societies necessary for the objectives of the Fellowship.

**Non-eligible expenses**

- Costs of entertainment, hospitality and gifts, other than those specified above, such as regular interactions with colleagues from the Institution and personnel meetings.
- Costs related to staff awards and recognition.
- Costs of basic services such as heat, light, water, compressed air, distilled water, vacuums, and janitorial services supplied to all laboratories in a research facility.
- Insurance costs for buildings or equipment.
- Costs associated with regulatory compliance, including ethical review, biohazard or radiation safety, environmental assessments, or provincial or municipal regulations and by-laws.
- Monthly parking fees for vehicles, unless specifically required for field work.
- Sales taxes to which an exemption or rebate applies.
- Costs of home rentals, unless specifically related to networking or field work.
- Costs of clothing.
- Patenting expenses.
- Costs of moving a lab.

**Summary of Fellowship Categories**

Note: Numbers are provided here only as an illustration and are inclusive of the management fees collected by the university and/or the Foundation. Please refer to the Memorandum of Agreement for detail of allocation and schedule of payments. The Foundation also pays a prize in the amount of \$50,000 directly to the fellow, in recognition for excellence in research and public engagement.



Last update: 5/7/2013 (The Guidelines may be up-dated from time to time as required.)