

## The Pierre Elliott Trudeau Foundation

### Doctoral Scholarship Funding Agreement 2014

#### 1.0 BASIC DESCRIPTION OF SCHOLARSHIP

The Trudeau Foundation Doctoral Scholarship (the “**Scholarship**”) is tenable for three years. The Scholarship may be extended to a fourth year upon application during the third year, under the terms and conditions set out in Schedules A and B. To be eligible for funding, a Trudeau Scholar (the “**Scholar**”) must be registered full-time in a doctoral program approved by The Pierre Elliott Trudeau Foundation (the “**Foundation**”). It is understood that scholars cannot benefit from a Trudeau Scholarship while holding a full-time position as a university professor or other similar role.

The Scholarship is comprised of two separate financial categories:

1. **The Stipend (“the Stipend”)**: A stipend of up to \$40,000 per year intended to cover the cost of tuition, reasonable living expenses as well as training and development. If the Scholar holds another scholarship or fellowship that allows for the accumulation of awards, 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.
2. **The Annual Travel and Networking Allowance (“ATA”)**: A travel allowance of up to \$20,000 per year is available to support research-related travel approved by the Foundation and cover networking expenses associated with the Foundation’s Public Interaction Program (“**PIP**”). Unless otherwise indicated, unused funds are unallocated at the end of the academic year.

*Time Spent Away from the Home University:* During the tenure of the Scholarship, the ATA can be used, in part, for research at an institution or fieldwork location away from the Scholar’s home university and outside the province in which that university is located. The Foundation will endeavour to facilitate placement and to help Scholars network with researchers at other institutions. When time is spent outside of Canada, it must be related directly to the Scholar’s research or a PIP event. Where a 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. For periods longer than four months, Scholars must rely on other sources of funding and the overall amount of support from the Foundation in the given academic year will be adjusted based on time spent abroad.

*Networking and Public Interaction:* These are important elements of the Trudeau Scholars Program. In addition to networking within their research communities, Scholars will actively engage in the Trudeau Community, a network facilitated by the Foundation, developing connections in non-academic spheres and with the general public. The Foundation also expects the Scholars to actively participate in PIP activities. Expenses related to networking and public engagements will be reimbursed out of the Scholar’s available ATA funds.

#### 2.0 PAYMENT SCHEDULE OF THE \$40, 000 ANNUAL STIPEND

If a Scholar is in compliance with the terms and conditions set out herein, the Foundation will adjust the Stipend for outside awards exceeding \$10,000, disbursing the balance of the Stipend 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

Each semester, the Scholar must submit proof of full-time enrolment in a doctoral program (letter from the department or official transcript).

The above payment schedule applies to Scholars commencing their approved full-time doctoral program in the autumn term. The payment schedule will be adjusted for Scholars starting at a later date. Payments may also be pro-rated when justified by personal or research-related circumstances.

It is possible for a Trudeau 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. The Scholar must provide relevant documentation when requesting a leave.

### **3.0 REIMBURSEMENT OF THE ATA**

#### **3.1 Who submits an expense claim**

Only the Scholar may submit an expense claim. With the exception of advances authorized under paragraph 3.4, expenses must be borne by the Scholar, with reimbursement requested subsequently.

#### **3.2 Eligible expenses**

*3.2.1 To be eligible, expenses must be related to the following activities:*

- 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:
  - Trudeau Conference
  - Trudeau Summer Institute
  - Trudeau Lecture
  - Trudeau Scholar-Mentor Retreat
  - Trudeau Scholars Workshop
  - Any other PIP event organized in partnership with the Foundation
  - A pre-approved English or French 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

Other expenses are not eligible unless pre-approved.

*3.2.2. To be eligible, expenses must be related to the following:*

- Transportation
- Accommodation
- Daily allowances
- Conferences fees
- Dependent care
- Research material for research purposes

- Transcription of interviews and compensation to participants for research interviews
- Moving expenses for research purposes

The Travel Policy (Schedule C) takes precedence over this financing agreement. In case of a conflict between the two, the Travel Policy will prevail.

### Transportation

Reasonable expenses will be reimbursed for transportation by plane, train, boat, intercity bus, and car.

*Air travel:* Travel must be in economy class, with care taken to book in advance and to adjust dates in order to obtain rates lower than full fare economy. Additional accommodation costs and daily allowance or per diem costs may be claimed if dates are adjusted to reduce the overall cost of a trip (e.g., staying over a Saturday night). Boarding passes must be submitted with the airplane ticket for reimbursement.

*Car travel:* Expenses may be reimbursed when travelling by car is the most practical and cost-effective means of undertaking a trip. The choice between renting a car and using a personal vehicle should be cost effective.

- *Car rental:* Reimbursable rentals are limited to 7 days per trip, unless pre-authorized by the Foundation. Only economy vehicles are eligible. Fuel expenses may be claimed.
- *Using a personal vehicle:* Reimbursement will be based on a kilometric rate when using a personal vehicle. Fuel expenses may not be claimed as they are accounted for in the kilometric rate. The rate applicable to the vehicle's province or territory of registration is outlined in the *Travel Procedures*, Appendix A, accessible on the Trudeau Foundation website.

*Other modes of transportation:* We ask that the Scholar always demonstrate the same financial caution when using other modes of transportation.

*Other costs:* Travel insurance as outlined in Section 7.0, vaccination fees and visa fees may be reimbursed. A Scholar is responsible for his or her own health insurance coverage, including repatriation coverage, for any travel where such insurance may be necessary.

### Accommodation

Reasonable expenses will be reimbursed for commercial and institutional accommodation. Non-luxury hotel accommodation may be reimbursed for up to 7 days per trip, unless pre-authorization for a longer stay has been given. The cost of private non-commercial accommodation (e.g., apartment rental; boarding arrangements) for periods of more than 7 days may be reimbursed if an estimated cost of such accommodation is pre-authorized by the Foundation.

### Daily allowances

For travel in Canada, up to CA \$80 per day may be reimbursed for meals, incidentals and taxi fares. Original receipts must be provided.

For travel in the United States, up to US \$80 per day may be reimbursed for meals, incidentals and taxi fares. Please convert to Canadian dollars, with an indication of the exchange rate(s) ([www.bankofcanada.ca/rates](http://www.bankofcanada.ca/rates)). Original receipts must be provided.

Per diems for meals and incidentals may be claimed for travel outside Canada and the United States, and are limited to 7 days per trip, unless pre-authorized. The Foundation uses the rates established in

the National Joint Council Travel Directive, Appendix D – Allowances – Module 4, online at [www.njc.cnm.gc.ca](http://www.njc.cnm.gc.ca).

#### Conference fees

When pre-authorized by the Foundation, conference fees may be reimbursed for participation in conferences related to the Scholar's area of research.

#### 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, to a daily maximum of \$75 per household with a receipt. Original receipts must be submitted.

#### Research material

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. No requests will be accepted in the fourth 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.

#### Ineligible fees and expenses:

- Other equipment such as a Blackberry
- Basic word processing software
- Internet service provider
- Supplies (e.g., ink cartridges, paper)
- USB keys, batteries
- Computer desk, chair and computer case
- Extended computer warranty (more than one year)

Please remember that your \$20,000 ATA is made available primarily for travel and networking purposes. We encourage you to find other sources of funding to cover computer-related costs. We will accommodate you, however, if no other funding is readily available.

#### 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.

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. If a gift is given rather than cash, the Scholar must provide the original invoice for the gift in addition to the signed letter from the participant.

#### 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 moving is essential for the Scholar's research. Original receipt and a proof of payment in the Scholar's name are required.

### 3.3 Original receipts and photocopies

Original receipts, invoices and other back-up documents (e.g., boarding passes) must be taped or glued on full-size sheets of blank/recycled paper, and submitted with your claim for reimbursement. If receipts, invoices or other back-up documents do not provide sufficient information regarding the expense, a note describing the nature of the expense must be added to the receipt. The Foundation may request additional documentation or information in order to approve reimbursement. Please note that a hotel reservation is not considered a proof of payment. Other back-up documentation (e.g., detailed hotel invoice, credit card slip or credit card statement) must be included.

Although you are not required by the Foundation to submit receipts related to per diem claims for travel outside of Canada and the United States, we recommend that you keep original receipts in the unlikely event that you are audited by the Canada Revenue Agency (CRA), as proof of what was reimbursed by the Foundation.

We also strongly recommend that you keep photocopies of the original documentation you send with expense claims.

### 3.4 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 provide a description of the purpose of the trip, the expected travel dates, and an itemized estimate of reimbursable expenses. Advances may be obtained only for expenses that must be paid before a voyage (plane tickets, conference fees, etc.). To clear 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 Trudeau Foundation if the related trip is cancelled.

### 3.5 When and how to submit an expense claim

Scholars may submit four expense claims per year under the ATA (it is possible to submit more than four claims per year, if necessary), no later than two months after the expense is incurred; 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, we ask that outstanding expenses for the period ending August 31 arrive at the Foundation office 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, we ask that the Scholar provide as many as possible of the receipts related to the trip prior to September 15.

Please allow more than one month for payment during the summertime, the annual audit process (September-October) and the December holidays.

All expense claims under the ATA are to be completed using one of two Trudeau Scholars Expense Claim Forms available 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.

### **3.6 ATA start-date**

The start-date of the first ATA period for Scholars enrolled in an approved full-time doctoral program starting in the fall is triggered when the Foundation has confirmed by e-mail that it is in receipt of the documents listed below; it ends on August 31 of the following year.

- a fully executed original of the Funding Agreement; and
- the documents requested in section 6.2 of the Funding Agreement.

In subsequent years, the ATA runs from September 1 to August 31. These dates will be adjusted forward if a Scholar's program starts other than in the fall.

### **3.7 Expenses related to a PIP event**

From time to time Scholars will be invited to participate in PIP events. As stated in section 1.0, these costs are eligible for reimbursement under the ATA. If a Scholar has already exhausted the ATA when invited to participate in such an event, the expenses associated with the event may be carried forward to the next year of the ATA or, if in the final year, the expenses may be deducted from the Stipend.

### **3.8 Parental leave and PIP activity**

A Scholar on parental leave who wishes to participate in a PIP activity may use the ATA. If the Scholar has to travel with a young child (under two years old) and be accompanied by a third person in order to see to the child's needs during the Scholar's participation in the PIP activities, the Scholar may use the ATA to cover the reasonable travel expenses of this third party. Reimbursement of the expenses of this third party will be subject to the conditions set out in this agreement. If the Scholar decides not to pursue his or her doctorate after the parental leave, any amounts used from the ATA will have to be reimbursed.

### **3.9 Summary: ATA expenses requiring pre-authorization**

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

- when travel is over 7 days for:
  - car rentals (location 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
- training in official languages of Canada
- purchase of a computer or laptop, a printer, a research-related software, a video camera, digital camera or recorder for research purposes
- participant fees and cost of transcribing an interview
- moving expenses for research purposes
- participation in a PIP activity during parental leave
- any expense not described in this agreement

## **4.0 TAX TREATMENT OF THE SCHOLARSHIP**

With the exception of reimbursements issued for research expenses, the Scholarship and PIP expenses are considered non-taxable income by the Canada Revenue Agency ("CRA"). The Scholar will receive a T4A or a T4ANR, depending on residence status for income tax purposes. Please read the document entitled

*Determination of an Individual's Residence Status* at <http://www.cra-arc.gc.ca/E/pub/tp/it221r3-consolid/it221r3-consolid-e.pdf> to make an informed decision regarding residence status. Scholars must also advise the Trudeau Foundation if their residence status for income tax purposes changes during the tenure of the Scholarship. As indicated in paragraph 56(1)(o) of the *Income Tax Act* and section 31 of CRA's IT-75R4 bulletin (<http://www.cra-arc.gc.ca/E/pub/tp/it75r4/it75r4-e.pdf>), certain research expenses may be deducted to offset their inclusion in income on the T4A. Although the Foundation can provide general comments regarding the tax slips, we recommend that you consult with an independent tax advisor for advice pertaining to your specific situation, especially with regard to the deductibility of eligible research expenses and the deductibility of reimbursed dependent care costs which have been included in income.

## **5.0 INTERNET-BASED NETWORKING**

The Scholar agrees to participate in the Trudeau Community (the “**Community**”) Internet-based network to discuss his or her area of study with other interested members of the Community. An e-mail routing address (e.g., [firstname.lastname@trudeaufoundation.net](mailto:firstname.lastname@trudeaufoundation.net)) is provided for each member of the Community and posted on the Foundation's website. E-mails received at this address will be re-routed to the Scholar's active personal e-mail address. Scholars can respond at their own discretion, exercising the same precaution as they would in responding to any electronic correspondence with unknown individuals; response e-mails will reveal the Scholar's personal e-mail address. We ask that the e-mail routing address (e.g., [firstname.lastname@trudeaufoundation.net](mailto:firstname.lastname@trudeaufoundation.net)) not be indicated as a “reply” or “from” address.

## **6.0 REPORTING REQUIREMENTS**

When starting an approved full-time doctoral program in the fall, a Trudeau Scholar will provide a mid-year summary report on research activities by December 1 of each year, and an annual report by May 1 of each year. The first annual report must be accompanied by an official transcript and a confirmation of enrolment in the doctoral program (an original signed letter from the host institution, addressed to the Foundation, stating the name of the Scholar and the expected duration of enrolment in the program). In the second year of funding, the Scholar must ask his or her doctoral research supervisor to send directly to the Foundation a brief letter updating the Foundation on the Scholar's doctoral research progress. In the final year of funding, the annual report is replaced by a final report.

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.

### **6.1 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, 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).

### **6.2 Documentation accompanying this Funding Agreement, to be submitted to the Foundation**

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

- a 250-500 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, e-mail)
- a Social Insurance Number for the preparation of annual tax slips; Scholars who are not eligible to obtain a Social Insurance Number must provide the Trudeau Foundation with an individual tax number for non-residents AND a letter indicating their permanent address (Canada or other country) for income tax purposes at the start-date of the Scholarship
- proof of citizenship (photocopy of passport personal data page or photocopy of birth certificate); where applicable, proof of immigration status in Canada (photocopy of immigration document)

- confirmation of full-time enrolment in the doctoral program (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)
- for Scholars with 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
- for Scholars with 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 who will be coming to Canada may provide Canadian bank account information once they are established in Canada)

### **6.3 Hardcover bound copy of dissertation**

We ask that you send a hardcover bound copy of your doctoral dissertation when final revisions have been approved, post thesis defence. We would also appreciate receiving a copy of your thesis if it is published.

### **6.4 Publications**

During the tenure of the Scholarship, Trudeau Scholars must identify themselves as such in all publications, whether as a single author or in collaboration with other researchers, or specify in a footnote that the research results were obtained with the financial support of the Trudeau Foundation.

## **7.0 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 Scholars comply with this requirement. Additional health insurance coverage, including repatriation coverage, must be obtained by the Scholar for any travel where such insurance may be necessary. Such additional health insurance coverage will be considered by the Foundation to be a reimbursable expense.

## **8.0 PRIVACY**

Safeguards are in place to ensure that the Scholars' personal information is carefully protected. Foundation personnel are authorized to access personal information based on their need to deal with the information. A Scholar should notify the Foundation of any particular requests relating to privacy.

## **9.0 GENERAL TERMS AND CONDITIONS**

The Scholarship is subject to annual confirmation, which is granted if the evaluation of the Scholar's annual report confirms compliance with the Trudeau Scholarship Program's eligibility requirements and standards of excellence.

Scholars grant permission to the Foundation to make public their names, photos, research interests, institutional affiliations and similar information.

Presence at the three following activities is required, except under extenuating circumstances: the Trudeau Conference, the Mentors-Scholars Retreat and the Summer Institute.

A false or misleading statement made by the Scholar to the Foundation related to the following may result in termination of the Scholarship and proceedings to recover funds disbursed:



- the Scholarship application
- the amount of funds received or expected from other scholarships or fellowships
- an expense claim

Scholars are expected to maintain a standard of ethical conduct that will uphold the good reputation of the Trudeau Scholarship Program.

The Foundation expects the Trudeau Scholars to respect the Foundation’s various policies. For more information, please visit our website at [www.trudeaufoundation.ca](http://www.trudeaufoundation.ca).

As the Trudeau Scholarship Program evolves, the Foundation may make reasonable modifications to the terms and conditions of this Funding Agreement, with advance notice provided to the Scholars.

**10.0 AWARD ACCEPTANCE**

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

**11.0 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.)

For the Foundation,

Read and accepted,

\_\_\_\_\_  
 Tim Brodhead  
 Interim President and CEO  
 The Pierre Elliott Trudeau Foundation

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

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Date

*The masculine gender is used throughout the text to simplify the reading of the contract.*

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

The Trudeau Scholarship Program provides support to exceptionally gifted individuals actively engaged in social sciences and humanities research who are expected to become leading national and international figures. The Foundation offers both financial and non-monetary support in order to assist the Scholars in writing their dissertations and completing their doctorates. The financial conditions for the thesis writing scholarship fluctuate based on the budget available. There may be less money available than in the previous three years. An annual travel allowance of up to \$2,000 is provided to allow the Scholar to attend at least one Foundation event, including the Summer Institute. The selection criteria are as follows:

A letter from the Doctoral Supervisor specifying:

- progress made to date 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 Trudeau 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 Writing Scholarship is in force, the Trudeau Scholar may interrupt the Scholarship for a one-time leave of absence of up to six months for one of the following reasons: parental leave, death of a close relation, or serious illness. The Scholar must provide relevant documentation when requesting a leave. In addition, if a Trudeau Scholar's doctorate is not sufficiently advanced to make use of the Writing Scholarship, the Scholar may delay the commencement of the Scholarship for a maximum period of one term. This delay period shall be deducted from the fourth year and that no funds shall be granted by the Foundation.

Extending a Trudeau Scholarship to a fourth year is not automatic and the number of 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 fourth-year 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. The scholars are also encouraged to enrol in a writing seminar, through their university, before the fourth-year 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 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. The decision is final.

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

**SCHEDULE B**  
**DISSEMINATION SCHOLARSHIP SELECTION CRITERIA**  
**FOURTH YEAR OF FUNDING AND SUPPORT**

The goal of the dissemination Scholarship program is to allow Trudeau Scholars to publish the results of their doctoral research. 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 Trudeau Foundation community
- comments on the experience of being a Trudeau Scholar
- a support letter from the Trudeau Mentor

During the period in which the Dissemination Scholarship is in force, the Trudeau Scholar may interrupt the Scholarship for a one-time leave of absence of up to six months for the following reasons: parental leave, death of a close relation, or serious illness. The Scholar must provide relevant documentation when requesting a leave. Extending a Trudeau Scholarship to a fourth year is not automatic and the number of 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. The decision is final.

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

## **SCHEDULE C TRAVEL POLICY**

### **PREAMBLE**

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. Through our different programs, the Foundation supports the members' capacity to travel to increase their knowledge or benefit society. This document sets out to clarify and standardize the procedures related to travel expenses covered by the Foundation.

The Foundation has adopted this policy in order to:

- Ensure exemplary management of our resources, drawing on standards in effect in similar organizations
- Optimize the use of resources allotted for travel
- Standardize practices among the various groups of travellers
- Offer travel conditions that meet the legitimate needs and expectations of the various groups of travellers
- Simplify program administration by clarifying travel rules and reducing the number of authorizations addressed to the Foundation personnel
- Achieve savings on travel and accommodations costs, to reinvest in causes related to the Foundation's mandate

The Foundation's *Travel Procedures* complements this policy and provides further information on its application. Travellers are asked to refer to that document and to recall that the travel agency follows these procedures when booking travel for the Foundation.

### **A. TRAVEL TARGETED BY THIS POLICY**

This directive applies to business travel undertaken with Foundation authorization:

1. 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
2. for social and professional activities undertaken for the Foundation, including representation and outreach activities

The following sections provide further information about the various groups of travellers.

### **B. PROGRAM BENEFICIARIES**

1. As set out in our mission, the Foundation supports the research and learning activities of the beneficiaries of our programs, including those that require travel within Canada or elsewhere in the world.
2. The Foundation promotes enlightened and lively debate on the major public policy issues that affect the citizens of Canada and the world and encourages our program beneficiaries to take part in such discussions. This is why we offer a travel allowance to our Fellows, Scholars and Mentors, to cover travel expenses for research and networking related to the Foundation's Public Interaction Program, in compliance with our funding agreement.
3. Our Fellows, Scholars and Mentors are among the Foundation's best ambassadors and are selected for their ideas and work on the most pressing social questions. The Foundation sometimes asks our

program beneficiaries to take part in activities related to our mission. Likewise, the Foundation sometimes solicits Fellows, Scholars and Mentors to sit on selection committees to contribute their opinions and experience.

4. The Foundation covers all reasonable expenses incurred in the exercise of these functions and other travel authorized by the Foundation.
5. This policy and the related procedures are meant to provide a framework for the management of business travel and to help all of the Foundation's program beneficiaries establish fair, reasonable and transparent travel practices.
6. The Foundation expects all program beneficiaries – Fellows, Scholars and Mentors – to comply with this travel policy.

**C. BOARD MEMBERS AND FOUNDATION MEMBERS**

1. The members of the Board and the members of the Corporation are invited to participate in Board meetings and the Annual General Assembly. They also attend annual public interaction events, such as the Annual Conference, and the Summer Institute. Board members may also serve on various committees, such as the Finance and Investment committee or the Applications and Nominations Review committee. Board members and Foundation members are also invited to participate in other social and professional activities and, if necessary, to travel to do so.
2. The Foundation covers all reasonable expenses incurred in the exercise of these functions and other travel authorized by the Foundation.
3. This policy and the related procedures are meant to provide a framework for the management of business travel and to help all Board and Foundation members establish fair, reasonable and transparent travel practices.
4. The Trudeau Foundation expects all Board and Foundation members to comply with this policy for all travel paid for by the Foundation.

**D. OFFICERS AND PERSONNEL**

1. The officers of the Corporation and the Foundation personnel must travel in the exercise of their duties. They represent the Foundation at various Foundation events or as guests. They may also take part in professional training or be asked by individuals or organizations to share their knowledge. They also travel to meet people in relation to the regular activities and operations of the Foundation.
2. The Foundation covers all reasonable expenses incurred in the exercise of these functions and other travel authorized by the Foundation.
3. This policy and the related procedures are meant to provide a framework for the management of business travel and to help all officers and personnel members establish fair, reasonable and transparent travel practices.
4. The Trudeau Foundation expects all officers of the Corporation and personnel members to comply with this policy for all travel paid for by the Foundation.

#### **E. OTHER TRAVELLERS**

1. The Foundation may ask other individuals to travel for Foundation-related purposes. For example, we sometimes call on the services of consultants, recruit researchers and decision-makers and others to sit on committees, and hire speakers or instructors for various events.
2. The Foundation covers all reasonable expenses incurred in the exercise of these functions and other travel authorized by the Foundation.
3. This policy and the related procedures are meant to provide a framework for the management of business travel and to help any individuals travelling for Foundation purposes to establish fair, reasonable and transparent travel practices.
4. The Foundation expects all of its guest travellers to comply with this travel policy.

#### **F. DISTRIBUTION OF THIS DIRECTIVE**

Every year, the president of the Foundation will give a copy of this directive to every Board member, member of the Foundation, director and personnel member. A copy will also be given to every program beneficiary with the letter confirming their Fellowship, Scholarship or Mentorship.

#### **G. EFFECTIVE DATE**

As this policy may represent a significant change for certain members of the community, it will come into effect following the schedule set out below, to allow for an adjustment period:

1. Program beneficiaries who received their Fellowship or Scholarship in 2007 or earlier: September 1, 2008
2. New program beneficiaries, beginning in January 2008: May 1, 2008
3. Board members and Members of the Corporation: September 1, 2008
4. Officers of the Corporation and Foundation personnel: May 1, 2008
5. Other travellers: May 1, 2008

#### **H. APPROVAL AND APPLICATION**

This policy was approved by resolution at the meeting of the Board of Directors on April 25, 2008.

The Foundation's *Travel Procedures* complements this policy and provides further information about its application.

The *Travel Procedures* are developed by the Foundation personnel, drawing on standards in effect in similar organizations, and are subject to change from time to time. Foundation personnel are responsible for enforcing the application of the travel policy and procedures.