



Guidelines for SDF Conference Funds

The Centre for Security and Defence Studies has limited funds available through the Security and Defence Forum (SDF) at DND to support graduate student, post-doc and junior faculty participation at both Canadian and international academic conferences.

Eligibility: Only M.A. and Ph.D. candidates, post-docs, and junior faculty (non-tenured academic appointments) who are participating in an academic conference or workshop are eligible for funding. Participation is defined as presenting a paper, speaking, or actively being part of a panel discussion. The conference or conference panel, and the paper being presented, must be security and defense-related.

Applications: Funding requests should be made to David Mendeloff, CSDS Director, at csds@carleton.ca. Requests must include a complete budget that reflects the funding guidelines and restrictions below. More information on application procedures follows.

Funding Guidelines and Restrictions

Eligible expenses include the following, subject to restrictions outlined below:

1. **Transportation:** Travel expenses in regular economy class as per Treasury Board guidelines (i.e.: the lowest available fare). Travel must be direct (other than flight layovers) between your home and conference city. Side travel cannot be reimbursed.
2. **Taxi:** Taxi rides to/from the airport/train station/bus station, to/from the hotel and to/from the conference.
3. **Conference registration fees:** Only *required* costs for participation in the conference will be covered. Optional costs, such as for conference-organized entertainment, are ineligible. Additional costs for conference-sponsored banquets or receptions must be submitted as a meal expense, subject to Treasury Board limits.
4. **Accommodations:** Only reasonable hotel room rates are eligible. The hotel name and quoted room rate should be provided with your budget in order to determine suitability before travel.

Note regarding meals: Meals are no longer eligible for reimbursement under the SDF Conference Fund program. However, pending availability of CSDS funds, CSDS may be able to reimburse you for meals taken in the context of conference participation up to the Treasury Board maximum. Itemized receipts (showing what items were purchased) for all meals are required. Alcohol expenses cannot be reimbursed. We cannot reimburse meal expenses

without a receipt. (Note that the meal limit applies to the cost of any conference banquets or receptions additional to conference registration fees.)

Important Caveats

1. Only travel expenses directly related to actual conference participation can be reimbursed. If you plan to arrive earlier or stay later for personal reasons, or a conference lasts several days or more and you plan to attend the entire event, but are actively participating on only one day, we can only reimburse that portion of your hotel and other expenses that would reasonably be associated with your participation. These are usually expenses incurred on the day of your participation and either one day before or one day after. In other words, if you are presenting at a conference on only one day, we will usually cover 2 nights of accommodations and related expenses. There are exceptions to this (for example if you are presenting on the first and last day of a conference that takes place over several days). Such details should be noted in the funding request.
2. CSDS reserves the right to limit, or in some cases deny, reimbursement if the terms of the funding have not been met. Prior approval of funding is required and is based on the information contained in the proposal submitted to CSDS. Once approval has been granted, CSDS must be notified of any changes to anticipated expenses, travel plans and, most importantly, the nature of participation or content of the paper being presented. If the final paper submitted differs substantively from the topic approved by CSDS, CSDS may not be able to provide reimbursement.
3. We cannot reimburse *incidental expenses*.
4. All expenses must be accompanied by original receipts and required documentation (i.e., original boarding passes). Reimbursements cannot be made without this. If you lose an original boarding pass, for example, you will not be reimbursed for that leg of the flight. In that situation you will need to contact the airline directly for proof of travel.

Preparing Your Funding Request

Prior to your trip you must submit to the Director of CSDS a formal request for funding. Reimbursements will not be made without prior approval of the Director. The request must include:

1. A summary description of the conference and your role in the conference.
2. A copy of the official conference announcement/agenda and registration form. If there is a conference website, please provide this information as well.
3. Documentation from the conference organizers confirming your participation in the conference.
4. A title and abstract of the paper being presented.
5. A formal budget in accordance with the guidelines and restrictions above.

Note that travel advances will not be provided. You are responsible for covering your own expenses. Reasonable expenses that adhere to the funding guidelines will be reimbursed upon your return. All reimbursement requests will be closely reviewed and adjusted if necessary.

SDF Conference Fund Reimbursement Procedure

Within one week of your trip, submit the following documentation to Cathleen Schmidt, DT 1423:

1. A covering letter indicating the name of the conference, paper presented, dates of participation and total amount to be reimbursed.
2. A complete, itemized expense breakdown using the attached excel template (Also available at www.carleton.ca/csds/funding). Note:
 - Expenses in foreign currency should be converted into Canadian dollars at the rate in effect at the time of each transaction. To determine the exchange rate at the time of transaction use the converter available at www.bankofcanada.ca/rates/exchange/. Alternatively, you may include a copy of your credit card statement that indicates the actual amount paid in Canadian dollars.
 - Expenses must be itemized (i.e., each individual expense transaction must be indicated). Each line of the expense report should correspond to an individual receipt.
 - Submit both an electronic copy and hard copy of the completed expense template.
3. A Carleton University Travel Reimbursement form that includes your personal information on page 1 (only your name, address, employee/student number), and your signature ("Signature of Claimant") on page 3. Please do not fill in any other information on this form. (Forms are available from Cathleen Schmidt.)
4. All original receipts and two (2) sets of photocopies of all original receipts. No expenses can be reimbursed without original receipts.
5. Evidence of conference participation: Submit two (2) copies of the paper delivered and the program or agenda showing your name. No reimbursement can be provided without this.
6. A completed expense reimbursement checklist (below).

SDF Conference Fund Reimbursement Checklist

Please ensure that you submit the proper paperwork with your reimbursement request according to the requirements above.

___Covering letter indicating the name of the conference, paper presented, dates of participation and total amount to be reimbursed.

___Completed expense form (excel template).

___Hard copy

___Electronic copy sent to csds@carleton.ca

___Carleton University Travel Reimbursement form that includes personal information on page 1 (only name, address, employee/student number), and signature ("Signature of Claimant") on page 3. Do not fill in any other information on this form.

___All original receipts. (Note: every item on the expense report must correspond to an original receipt.)

___Two (2) set of photocopies of all original receipts.

___Two (2) copies of paper presented and/or program or agenda showing your name.