



DATA LIBERATION INITIATIVE

FUNDING POLICY¹ AND PROCEDURES

FOR TRAINING WORKSHOPS

Based on discussions at its fall, 2000 and spring 2004 meetings as well as on past practices, the DLI External Advisory Committee has adopted the following policies and procedures for DLI Training support

1. Formal DLI training, financially supported by the DLI budget, occurs at a regional level and is intended to provide all DLI Contacts with a base-level of competence in handling the responsibilities of managing the DLI at their home institutions.
2. There are four DLI training regions, each of which has 2 co-ordinators who are responsible for the planning and implementation of the training workshops in their region.
3. For each fiscal year, the External Advisory Committee votes a budgetary item for regional training support². Within the allowable expenses that are funded by this budgetary item, the manner and degree to which the amount is used for a Workshop is decided by the regional co-ordinators.
4. The DLI Project will financially support:
 - 4.1 Travel and/or accommodation expenses, in whole or in part depending on the number of participants and subject to local circumstances, incurred by individuals attending a DLI Workshop.
 - 4.2 Such expenses will be paid by the DLI Project to individual participants, contingent on the submission, and validity, of their expense claim.
 - 4.3 Full travel and accommodation expenses incurred by the trainer(s) at a Workshop.
 - 4.4 Such expenses will be paid by the DLI Project to individual trainer(s) contingent on the submission, and validity, of their expense claim(s).

1. Last review May 2005, no changes to content.

Revisions of October 12, 2004 document with amendments from April 2002 and May 2004.

2. Until modified the annual amount budgeted is \$10,000 for each region.

- 4.5 Overhead expenses (for example, photocopying, lab or classroom rental) to an amount not to exceed \$2,000.
- Such expenses will be paid in accordance with Treasury Board guidelines to the hosting institution.
 - Local support is provided to cover meals and transportation costs for the designated local arrangements coordinator.
5. As a rule, financial support will be offered for a DLI Contact's attendance at only one Workshop each year based on economy transportation rates. DLI Contacts are; however, free to attend additional Workshops without DLI funding.
6. The DLI project does not fund the supporting of salaries or consultant fees or honoraria. The participation of key members of the statistics Canada DLI Section in training is encouraged; however this will be budgeted within the operational budget of the Section.
7. The DLI Program does not normally fund the attendance of representatives of the STC Regional Offices or the Research data Centres, although reciprocal attendance at training sessions is encouraged. Other STC representatives would only be funded if they are invited to provide training and as such would be funded as trainers.
8. From time to time special training initiatives may be required. All proposals for these special training initiatives must be submitted to the External Advisory Committee for budgetary consideration as circumstances arise.
9. The Regional Training Co-ordinators will submit a training proposal to the External Advisory Committee at a minimum of 2 weeks in advance of a proposed training workshop. The proposal will include:
- the location and date(s) of the Workshop;
 - a detailed outline of the costs for which DLI funding support will be sought;
 - an overview of the curriculum based on particular regional requirements;
 - the expected number of attendees;
 - the name of the trainer(s).
10. Workshop publicity and program notes should make mention of the fact that the DLI Program is providing financial support.
- taking into account Statistics Canada rules and regulations, instruct the participants on how to fill out their expense claims, including the attachment of all receipts and ensuring that full name and address information is provided. Expense claims are mailed directly to the DLI Section by the participants.
 - ensure that an invoice from the host institution is sent to the appropriate Statistics Canada Financial Officer and/or the DLI Section.

11. After the Workshop, regional co-ordinators and/or DLI Section member will:

12. The four DLI Training Regions and their co-ordinators are as follows (*as of May 2005*):

Atlantic region:

Elizabeth Hamilton, University of New Brunswick

Alberta Wood, Memorial University of Newfoundland

Québec and Nunavut region:

Richard Boily, Université du Québec à Rimouski

Maryna Beaulieu, Université de Montréal

Ontario region:

Wendy Watkins, Carleton University

Laine Ruus, University of Toronto

Prairie, Pacific, Yukon and Northwest Territories region:

Sharon Neary, University of Calgary

Karen Hunt, University of Winnipeg