



**Notice to Cooperants and Executing Agencies with Advisors**

**Regarding Amendments to the *Technical Assistance Handbook***

Due to recent legislation changes, the *Technical Assistance Handbook* for cooperants and advisors has been amended accordingly. These changes are **effective April 1, 2009** unless otherwise noted.

This is an amendment to the *Technical Assistance Handbook* for CIDA Cooperants and Executing Agencies and precedes an upcoming full review of the Handbook. This amendment forms part of the cooperant’s contract and may apply to an advisor if the executing agency's contract with CIDA stipulates the application of the provisions of the Handbook to its personnel assigned overseas.

This amendment describes only additions, changes or deletions to the Handbook. Unless an addition, change or deletion is mentioned herein, the Handbook remains in effect.

**Amendments to the *Technical Assistance Handbook***

<b>Chapter 4</b> <b>Travel - Relocation</b>	<b>4.2</b> Relocation Transportation Costs	<b>NEW</b>  The Relocation Travel Allowance (RTA) now includes a new Local Transportation Allowance for relocations to and from Canada of \$75.00. Other local transportation costs incurred in Canada will not be reimbursed
	<b>4.3.2</b> Temporary living expenses upon arrival in country of assignment, Residence not ready	<b>CHANGES</b> to Meal and incidental allowances  Day 1 – 4  Meal and incidental allowances are included in the RTA (2 days at the contract address before departure from Canada plus first 2 days in country of assignment)  Day 5 – 30  <u>Commercial accommodation</u> : 100% of daily meal allowance for the cooperant/advisor and each accompanying dependant and 100% of incidental allowance for cooperant/advisor  <u>Self contained or private accommodation</u> : 75% of daily meal allowance for the cooperant/advisor and each accompanying dependant and 75% of incidental allowance for cooperant/advisor  From 31 <sup>st</sup> – 35 <sup>th</sup> day  Self contained or private accommodation only. No meal or incidental allowances
<b>Chapter 5</b>	<b>5.4</b>	<b>NEW</b>

<p><b>Travel</b></p>	<p>Vacation Travel Allowance</p>	<ul style="list-style-type: none"> <li>• May 1<sup>st</sup> airfare quotes will be used to calculate VTA from June 1<sup>st</sup> to the next May 31<sup>st</sup>. The Administrative Officer shall establish this quote by choosing the most economical airfare from two different independent sources</li> <li>• May 1<sup>st</sup> exchange rates shall be used to convert airfare quotes</li> <li>• VTA can be used for multiple trips</li> <li>• Each trip described on the new VTA Appendix 5 form must be taken outside the city of assignment</li> <li>• VTA will be issued once per VTA period based on VTA form submitted</li> <li>• VTA for the entire period will apply to accompanying dependants at the time of submitting the VTA form. i.e. VTA will not be adjusted should a dependant join the cooperant/advisor at the post after the VTA has been submitted. If any new VTA is earned during the period of assignment, the new dependant will then be eligible for that next period's VTA request</li> <li>• Cooperant/advisor and accompanying dependants do not have to travel at the same time</li> <li>• New Appendix 12 Vacation Travel Allowance Certification form</li> <li>• New Appendix 11 Travel Allowance Certification form will continue to be used for Family Reunion Travel, Education Travel and Compassionate Travel</li> </ul> <p><b>CHANGES</b></p> <ul style="list-style-type: none"> <li>• Cooperant/advisor does not have to take 10 consecutive days leave</li> <li>• Cooperant/advisor must account for 75% of VTA in travel and travel related expenses for each individual traveling</li> <li>• No minimum percent of the VTA is required for transportation (previously 50%)</li> </ul>
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<b>Chapter 9</b> Overseas Allowances	<b>9.2</b> Post Living Allowance (PLA)	<b>CHANGES</b> Treasury Board has reminded Departments that the nominal salary which is used to calculate this allowance should have been capped at \$100,000, as a result of the 2001 cyclical review. Effective April 1, 2009, the nominal salary is capped at \$100,000. <ul style="list-style-type: none"> <li>• <b>Example:</b> <ul style="list-style-type: none"> <li>◦ A fee/salary of \$120,350 falls into the fee range of \$100,000 to \$100,000 plus, of which the Mid-point/Nominal fee is \$100,000. The associated percentage of adjustment is .422. For a CIDA index of 130, the formula is:</li> <li>◦ Annual PLA = <math>\frac{100,000 \times .422 \times (130 - 100)}{100}</math></li> <li>◦ Annual PLA = \$12,660</li> </ul> </li> <li>• Effective June 1, 2009 there is a methodology change to reflect annual inflation based on the Consumer Price Index for the previous calendar year. Also, the percentage used to calculate the PLA will be based on income level and will change as needed when income levels change</li> <li>• The April 1, 2009 and the June 1, 2009 tables will be published in the <i>Schedules to the Technical Assistance Handbook</i></li> </ul>
	<b>9.3</b> Post Differential Allowance	<b>NEW</b> Special rates recognizing hostilities and natural disasters may be added to this allowance for a particular city. If a special rate applies for a particular location, it will be listed in the <i>Schedules to the Technical Assistance Handbook</i> for Chapter 9.3  <b>CHANGE</b> The family configuration component for this allowance has increased to a maximum of 4 or more accompanying dependants (previous maximum was 2). Refer to the April 1, 2009 <i>Schedules to the Technical Assistance Handbook</i> Chapter 9.3 for the new rates for increased family configuration
	<b>9.4</b> Overseas Service Premium	<b>CHANGE</b> The family configuration component for this allowance has increased to a maximum of 4 accompanying dependants or more (previous maximum was 2). Refer to the April 1, 2009 <i>Schedules to the Technical Assistance Handbook</i> Chapter 9.4 for the new rates for increased family configuration

<p><b>Chapter 10</b> Short-Term Assignment And Short-Term Relocation</p>	<p><b>10.2</b> Short-Term Relocation  10.2.2 Assignment overseas</p>	<p><b>NEW</b></p> <p>10.2.2 a) The Overseas Service Premium shall now apply to short-term relocations in accordance with Chapter 9.4</p> <p>Reimbursement of actual costs for laundry for cooperants/ advisors who occupy accommodation that is not provided with laundry facilities, upon presentation of original receipts. (Laundry facilities consist of a washer, dryer)</p> <p>When the Administrative Officer is satisfied that dry cleaning costs in the city of assignment significantly exceed those at the cooperant/advisor's contract address, reimbursement of 50% of the actual cost for dry cleaning shall be reimbursed, upon presentation of original receipts.</p> <p><b>REPLACE</b></p> <p>10.2.2 b) Meal Cost Assistance</p> <p>Upon arrival in the city of assignment, the applicable Treasury Board Travel Directive (see Chapter 1.10 for the Internet address) daily location meal allowance shall be payable for the first 30 days. No incidentals are payable.</p> <p>From the 31<sup>st</sup> day to the 120<sup>th</sup> consecutive day,</p> <p>i) <b>in self-contained accommodation</b>, the cooperant/advisor receives, for the duration of the assignment, a daily meal allowance equivalent to seventy-five percent (75%) of the daily meal allowance for that location. No incidentals are payable.</p> <p>ii) <b>in commercial accommodation</b>, <u>only if</u> meal-preparation facilities are not available and if self-contained accommodation is not obtainable, the cooperant/advisor receives a daily meal allowance equivalent to seventy-five percent (75%) of the daily meal allowance for that location. No incidentals are payable.</p> <p>From the 121<sup>st</sup> day to the end of short-term relocation,</p> <p>iii) <b>In self-contained or private accommodation</b>, fifty percent (50%) of the daily meal allowance. No incidentals are payable.</p> <p><u>Special circumstances</u></p> <p>Where, due to special circumstances such as difficulty in finding food and private accommodation, or if restaurant facilities are limited, and the Project Manager deems the meal allowance outlined above as inadequate, a meal allowance considered reasonable may be authorized by the Administrative Officer, not to exceed the daily meal allowance for that location. No incidentals are payable.</p> <p><b>DELETE</b></p> <p>10.2.2 a): Post Living Allowance no longer applies</p>
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## Appendix 5 Request for Vacation Travel Allowance (VTA)

Please authorize a vacation travel allowance, in accordance with Chapter 5.4 for the following traveller(s):

**Name of Cooperant/Advisor:**

**City/Country of Assignment:**

**Step 1 (To be completed by Cooperant/Advisor) Approximate cost of Planned Vacation Travel Trips for the Current Vacation Allowance Period.**

	Description of Trips Planned for the Vacation Travel Allowance Period			
	<u>Trip 1</u>	<u>Trip 2</u>	<u>Trip 3</u>	
<b>Name of Traveller(s)</b> <b>Adults:</b>  <b>Children:</b> (incl. age at time of trip)  Mode of Transport  From:  To:  Approximate Travel Date(s):				<b>Total Approximate Cost of all trips ↓</b>
Approximate travel and travel related costs				

**Step 2 (To be completed by Administrative Officer based on May 1 fare quotes using two different independent sources)**

**CALCULATION OF VTA AMOUNT:**

Airfare (before taxes)	75% of May 1 airfare	Bank of Canada exchange rate May 1	# of Adults/Children	Total airfare
Adult fare				
Child fare				

If closest airport is more than 100 km add local transportation

Distance	International or Canadian Km rate	Bank of Canada exchange rate May 1	Local Transportation added
Residence in City of assignment to airport			
Contract address to airport			

**TOTAL AMOUNT OF VTA C\$ \_\_\_\_\_**

**Appendix 5**  
**Request for Vacation Travel Allowance (VTA)**  
**Conditions of Non-accountable VT Allowance**

- The allowance applies to the cooperant/advisor, accompanying dependants and student dependants authorized to study in the country of assignment or authorized by CIDA's Technical Assistance Unit to study in a third country (see Chapter 8.2.5), in accordance with the frequency table in Chapter 5.4.2. (a).
- The amount of the allowance is calculated as 75% of a most economical full (Y) economy class return airfare (excluding taxes) by the most direct routing, city of assignment - contract address - city of assignment (attach May 1 fare quote including adult/child fares). For children and youth, the percentage is applied to the reduced child or youth fare. There is no supplement for stopovers.
- If the nearest major airport is more than 100 km from the city of assignment or the contract address, the VTA can also include an amount to cover the return distance from the major airport. This amount shall be in accordance with the Treasury Board Travel Directive Canadian kilometre rate or, for international kilometre rates, at the kilometre rate at locations abroad (tax paid) published in the Treasury Board Travel Directive by the Department of Foreign Affairs and International Trade (see Chapter 1.10 for the Internet address).
- The applicable Bank of Canada exchange rate (see Chapter 1.10 for the Internet address) is the rate effective on May 1.
- Approved leave forms must accompany this request.
- The Administrative Officer must be notified if the cooperant/advisor or dependants are absent from the city of assignment for more than 25 working days (see Chapter 9.5.3 Overseas Allowances-temporary absences).
- Each person's VTA entitlement can be used for one or more trips, cannot be transferred to another person, and must take place during the period of the assignment. The trip must start and end at the city of assignment and the vacation destinations can be other than the contract address but must be outside the city of assignment.
- Once approved by the Administrative Officer, the allowance for the full VTA period will be paid to the cooperant/advisor no sooner than 60 days prior to the first planned vacation trip.
- Cooperant/advisor must read Chapter 12 of the Technical Assistance Handbook and complete the reporting requirements described therein. The Vacation Travel Allowance Certification form (Appendix 12) is to be completed and submitted within 30 days of completion of the final planned trip indicated on this form, or prior to final departure from the city of assignment, whichever date is first.
- Cooperant must retain evidence of travel and travel related expenses for a period of seven (7) years. If, when requested, the cooperant/advisor cannot demonstrate that the allowance was used for the purpose intended, the Administrative Officer will reduce the allowance by the unsubstantiated amount. If, when requested, the executing agency cannot demonstrate that the allowance provided to the advisor was used for the purpose intended, CIDA will reduce the claim accordingly by the unsubstantiated amount.
- At least 75% of the allowance must be accounted for when completing the Vacation Travel Allowance Certification (appendix 12) form including all travel and other vacation travel-related costs (e.g. accommodation, meals, tours, entry fees)
- No further allowance will be issued until the Vacation Travel Allowance Certification form - Appendix 12 - has been completed and submitted to the Administrative Officer.

*I confirm that I have read the conditions, and accept the requirement of providing evidence that the entire allowance was used for travel and travel related expenses.*

\_\_\_\_\_  
Cooperant/Advisor Signature

\_\_\_\_\_  
Date

**Please return or fax this completed and signed form (include annual leave form) to the Administrative Officer.**

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**VTA VERIFIED AND AUTHORIZED by the Administrative Officer:**

\_\_\_\_\_  
**Administrative Officer**

\_\_\_\_\_  
**Date**

**Appendix 11  
Travel Allowance Certification**

**Chapter 12 of Technical Assistance Handbook  
REPORTING REQUIREMENTS AND VERIFICATION OF TRAVEL ALLOWANCES**

Cooperant/Advisor Name: \_\_\_\_\_ Country of Assignment: \_\_\_\_\_

Type of Allowance: Family Reunion Travel, Education Travel, Compassionate Travel

Travel Dates	Persons Travelling	Destination	Expenses (Details of trip – e.g. transportation, meals, accommodation)	Total Amount Spent
			<b>Amount received (C\$):</b>	
			<b>Difference (C\$):</b>	

This Travel Allowance Certification Form must be submitted for travel described Chapters 5.5, 5.6 and 5.7 of the Technical Assistance Handbook.

It must be submitted within 30 days of completion of travel or end of contract, whichever ever comes first.

Additional non-accountable allowances will not be issued until Certifications of previous allowances are provided (see Chapter 12 Verification of Allowances).

This report will be used as the basis of any subsequent verification or audit.

Cooperants must ensure that they retain proof of travel for seven (7) years. Executing agencies must retain proof of travel by advisors for seven (7) years

**CERTIFICATION:**  
I certify that the above information correctly describes travel undertaken in accordance with the Technical Assistance Handbook.

\_\_\_\_\_  
**Cooperant/Advisor Signature**                      **Date**

**Verified by:**  
\_\_\_\_\_

**Administrative Officer**                      **Date**

**Please fax or e-mail (as an attachment) to the Administrative Officer.**

**Appendix 12  
Vacation Travel Allowance Certification**

**Chapter 12 of Technical Assistance Handbook  
REPORTING REQUIREMENTS AND VERIFICATION OF VACATION TRAVEL ALLOWANCE**

**Cooperant/Advisor Name:** \_\_\_\_\_ **Country of Assignment:** \_\_\_\_\_

Name of traveller	Travel Dates and destination(s)(list all trips)	Total Expenses (Details per trip – e.g. transportation, meals, entertainment, accommodation)	Amount of allowance received (per traveller)	Amount to account for per traveller (75% of allowance)	Amount to recover (if any)

This Travel Allowance Certification Form must be submitted for travel described Chapters 5.4 of the Technical Assistance Handbook.

75% of allowance issued per traveller must be accounted for.

It must be submitted within 30 days of completion of last planned trip during this VTA Period or at the end of the contract, whichever comes first.

Additional non-accountable allowances will not be issued until Certifications of previous allowances are provided.

This report will be used as the basis of any subsequent verification or audit.

Cooperants must ensure that they retain proof of travel for seven (7) years. Executing Agencies must ensure that they retain proof of travel by Advisors for seven (7) years.

**CERTIFICATION:**  
**I certify that the above information correctly describes travel undertaken in accordance with the Technical Assistance Handbook.**

\_\_\_\_\_  
**Cooperant/Advisor Signature**                      **Date**

**Verified by:**  
\_\_\_\_\_  
**Administrative Officer**                                      **Date**

**Please fax or e-mail (as an attachment) to the Administrative Officer.**