

# The Foundation For Ideas

# Annual Report 2016–2017

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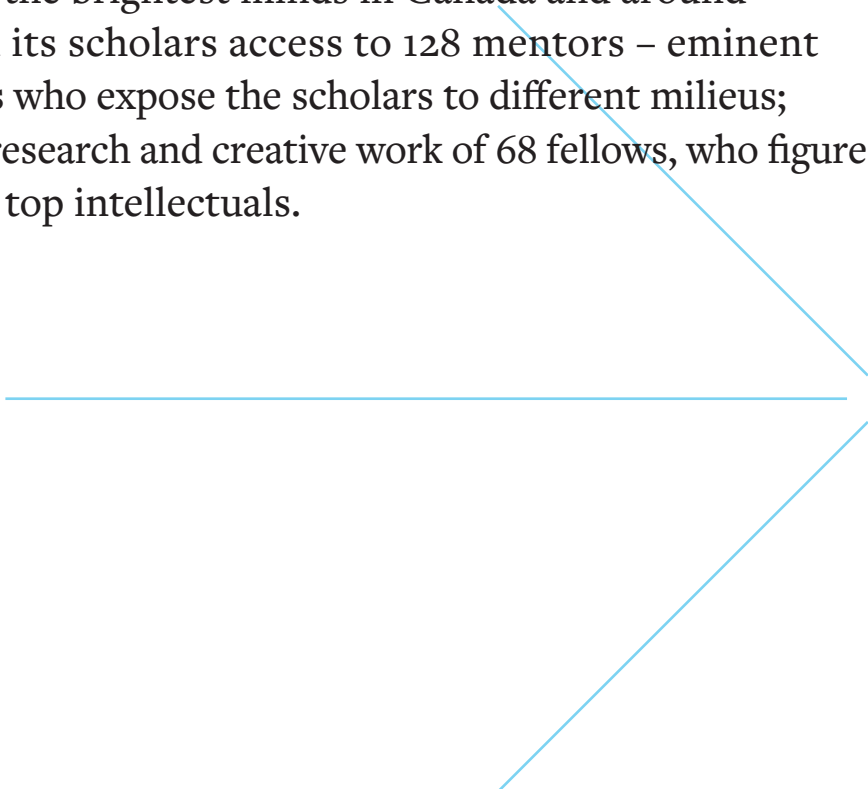
Our offices are located on the traditional  
territory of the Kanien'kehá:ka (Mohawk),  
a place that has long served as a site  
of meeting and exchange among nations.

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The Pierre Elliott Trudeau Foundation is an independent and non-partisan charity established in 2001 as a living memorial to the former prime minister. In 2002, with the support of the House of Commons, the Government of Canada endowed the Foundation with the Advanced Research in the Humanities and Human Sciences Fund. The Foundation also benefits from private donations. By granting doctoral scholarships, awarding fellowships, appointing mentors, and holding public events, the Foundation encourages critical reflection and action in four areas important to Canadians: human rights and dignity, responsible citizenship, Canada's role in the world, and people and their natural environment.

To date, the Foundation has disbursed \$57 million through its programs. Of this sum, grants and awards account for \$35 million. More specifically, from its founding until 31 August 2017, the Foundation has granted 217 doctoral scholarships, helping to develop some of the brightest minds in Canada and around the world; given its scholars access to 128 mentors – eminent Canadian leaders who expose the scholars to different milieus; and enabled the research and creative work of 68 fellows, who figure among Canada's top intellectuals.



# The Foundation for ideas

Joint message from  
the Chair and the President

The Pierre Elliott Trudeau Foundation was established in 2001 as an independent non-profit organization to support research and public engagement in four areas to which our namesake, the late prime minister, was committed throughout his life. These areas are human rights and dignity, responsible citizenship, Canada in the world, and people and their natural environment.



**JOHN MCCALL MACBAIN, O.C.**  
Chairman of the  
Board of Directors



**MORRIS ROSENBERG, C.M.**  
President and  
Chief Executive Officer

Over the past 15 years, the Foundation has supported nearly 300 social sciences and humanities researchers as they explored critical issues within these themes – making it a unique foundation for ideas. This research has focused on such issues as the balance between national security and civil liberties, reimagining Canada's relationship with Indigenous peoples, resource sustainability, states in conflict, immigration and refugee policy, and the rights and dignity of vulnerable and marginalized groups.

However, the Foundation does much more than fund ideas. We believe in the importance of making research accessible outside the universities – making it available to policymakers and citizens in accessible language, sharing it not only in academic journals but in traditional and new media as well. We also believe that it is important to break down silos and challenge conventional thinking. And we do this by convening events that bring different sectors, different disciplines, and different generations together.

We organize site visits across Canada and abroad so that our scholars, mentors, and fellows can meet communities grappling with issues like homelessness, addiction, food insecurity, the legacy of residential schools, and access to justice. These encounters build a deeper understanding of Canada and, often, lead to ongoing involvement by members of the Foundation community with leaders who are working every day to address these issues.

We help young academic researchers learn how to tell stories about their research in compelling ways. This year, scholars Wendell Adjetey, Aaron Mills, and Zoe Todd participated in the Walrus Talks series entitled “We Desire a Better Country” in Toronto, Surrey, and Yellowknife, respectively. Two other scholars, Leah Trueblood and Jesse Thistle, were featured on the CBC Radio program “Ideas from the Trenches” on the risks related to the poor level of discourse before referendums and on confronting Métis trauma. Numerous op-eds and articles on our community's work also appeared in mainstream and specialized media.

We also provide learning opportunities for how to work in partnership with governments, NGOs, and the private sector. In February 2017, for example, we supported five scholars as they organized a two-day conference in Ottawa on the future of drug policy in Canada. The event was attended by more than 120 public health and community workers, researchers, police representatives, injection drug users, and politicians.

Many of our doctoral scholars pursue academic careers, while others have made their mark in politics, human rights promotion, international development, public health, public service, or diplomacy. Whatever their career trajectory, the Foundation gives them opportunities to engage with accomplished mentors and fellows, to be exposed to people with lived experience, and to confront ideas that equip them to contribute to the next generation of leaders in Canada and the world.

At the same time, we reject the notion that learning is a one-way download from more experienced mentors and fellows to younger scholars. All participants in the Foundation are engaged in a learning community. We expose mentors and fellows to different ways of understanding the world too, and they come away changed.

It would be impossible, in one report, to give a full sense of all the work we are supporting. So we have chosen to tell three stories about our work. The first is a profile of two scholars who are putting engaged scholarship into practice. The second is an example of research shedding light on an important policy issue: the economic benefits of diversity. And the third profiles a scholar who had been a child in foster care and whose passion is to bring much-needed reforms to how Canada supports children in care.

Through these and many other initiatives, the Foundation builds on its independence and works with others to support rigorous research, encourage new ideas based on evidence, and inform public discourse. This three-pronged approach is, in our view, a winning formula for promoting strong current thinkers and developing the next generation of leaders in Canada and the world.

# Our programs

## Doctoral Scholarships

FOR PHD STUDENTS

Our doctoral scholarship in the humanities and social sciences is unique in Canada for its scope and stature. Each year, the Foundation awards up to fifteen scholarships to Canadian and foreign doctoral candidates pursuing research related to one of our four founding themes. Our scholars are outstanding students who are interested in growing in a multidisciplinary learning environment and in addressing important questions for Canada and the world.

## Mentorships

FOR CANADIAN LEADERS

Our mentorship program connects highly accomplished and engaged Canadians from the public, private, cultural, and not-for-profit sectors with scholars, so that our mentors can guide the next generation of leaders in the social sciences and humanities. Mentors also provide a crucial bridge between the research world and the public sphere, a service that greatly strengthens the Foundation's community of researchers and the Foundation itself. Each year, the Foundation appoints up to twelve mentors who are paired with one or two Foundation scholars each for a period of three years. Mentors do much to enrich the Foundation's mission.

## Research Fellowships

FOR INNOVATIVE THINKERS

Our fellowships offer sustained support to intellectuals who are recognized for their productivity, their commitment to communicating their findings to the public, and their ability to imagine innovative approaches to some of the major issues facing society. Each year, the Foundation appoints up to five fellows. Our fellows are active in a field of the humanities and social sciences that touches on one or more of the Foundation's four themes.

## Public Interaction Program

FOR AN INFORMED NETWORK

The Foundation is building a community of creative and critical thinkers and giving them ways to work with the wider public to develop and communicate ideas that matter. To foster a network of informed and engaged citizens, the Foundation organizes and provides financial and logistical support for some fifteen events each year. Attracting hundreds of participants, this program brings together all Foundation program recipients – fellows, scholars, and mentors – to generate informed and lively debate on major issues of public policy affecting Canadians and global society.

# Growing the next generation of engaged scholars



**STEVEN J. HOFFMAN**, 2012 scholar  
Scientific Director, Institute  
of Population and Public Health



**ZOE TODD**, 2011 scholar  
Assistant Professor, Department of Sociology  
and Anthropology, Carleton University



Not everyone knows that the scientific director of the Institute of Population and Public Health – one of the Canadian Institutes of Health Research (CIHR)'s 13 prestigious institutes – is alumnus Foundation scholar Steven J. Hoffman (2012). To Steven, the Pierre Elliott Trudeau Foundation not only made it possible for him to take on the CIHR role, but has also helped to make public engagement among academics a growing trend. Public engagement refers to academics sharing their knowledge and learning in turn from communities, decision makers, and others outside the academic sphere.

Zoe Todd, also an alumna scholar (2011), agrees that it is essential that research and science support people on the ground. As she says, “We’re all citizens and members of communities and I want to be connected to the real world. I’ve always been outspoken on sensitive topics around Indigenous women or decolonization, even though people often told me to keep my head down until I got tenure.” With conviction and dedication, Zoe says, “There’s a thirst for change and the Foundation makes thoughtful, socially conscious academic citizenship possible.” Now a professor of anthropology at Carleton University, Zoe Todd introduces herself as a feminist Métis public intellectual. Her research sets forth feminist Indigenous (Métis) perspectives on species extinction, traditional fishing, colonialism, and Indigenous governance in Canada. Zoe credits the Foundation with enabling her to earn her PhD despite the obstacles. “Without the Foundation’s support, I couldn’t have completed my thesis, let alone flourished after graduating,” she says simply.

Likewise, Steven Hoffman attributes his energy and confidence to his experience at the Foundation. Young and talented, he holds a position normally reserved for professionals twice his age. This position resulted from his relationship with 2014 mentor Marie-Lucie Morin: “Marie-Lucie showed me different options available to me, even at the start of my career. She pushed me to think bigger, to consider the various professional avenues within my grasp and to look beyond the idea that I was too young to achieve those things.”

A Harvard graduate, Steven is both an international lawyer and a researcher specializing in public health. In addition to his duties at the CIHR, he is the director of the Global Strategy Lab at the University of Ottawa and a professor of global health, law, and political science at York University. “It’s intense. It’s a lot of work,” he says, but enthusiastically. “I have the opportunity to help solve concrete problems.”

Like Steven, Zoe embodies a new generation of engaged researchers/practitioners supported by the Foundation. Both she and Steven downplay the financial aspects of the Foundation’s scholarship, saying that although the money was vital, it was just one facet of their experience at the Foundation. More important was the Foundation’s validation of their role as engaged intellectuals – this, they say, was nothing short of transformational. Steven also notes the Foundation’s unique ability to bring together the proponents of a culture of engagement, i.e., to create an environment of scholars, fellows, and mentors who affirm the importance of informing public debate.

Zoe claimed this culture early in her doctorate. She made use of technological tools like Twitter and collaborative blogs to reach out to her Alberta community while in Scotland for her PhD studies. This helped her feel connected to Canadian issues and maintain her network, even when abroad. Her hard work paid off: in March, the Foundation secured her an invitation to speak at *The Walrus Talks – Conversations about Canada: We Desire a Better Country*, where she brilliantly addressed Indigenous rights and the management of traditional fishing in Canada as part of the Walrus Foundation’s cross-Canada tour marking the country’s 150 years. Zoe’s talk continues to be viewed today.

A prolific science writer, Steven also communicates on social and traditional media. In 2017, for example, he appeared on CBC’s *The National*, discussing the impact of heat waves on populations, particularly in Asia. He still recalls the support he received when publishing his first opinion piece in *The Globe and Mail*. “Maybe I should have been listening to the speakers,” he remembers. “But we were at the annual Foundation conference in Edmonton and I wanted to respond to an announcement by the federal government about development aid. I was surrounded by great people and I began writing during the conference itself, emailing version after version to more experienced writers like scholars Sara Angel and Michael Pal. My article went back and forth and by the end of the session, I had my first piece: it was published the next day.” In his view, this foray would never have happened without the support of the Foundation network.

In November 2017, along with three other scholars and a fellow, Steven organized a workshop entitled “Valuing Engaged Scholarship.” Supported by the Foundation and attended by a variety of practitioners, the workshop discussed obstacles to and opportunities for recognizing researchers’ work outside the scientific sphere. In this way, Steven hopes to help the Foundation continue to act as a vector for change, slowly but surely paving the way for the next generation of engaged researchers.

**BESSMA MOMANI**, 2015 fellow  
Professor, Department of Political Science  
and Balsillie School of International Affairs,  
University of Waterloo



# Capturing the economic benefits of diversity



**JILLIAN STIRK**, 2015 mentor  
Former Ambassador to Norway  
and assistant deputy minister in  
the federal public service

International news reports are filled with stories of countries turning inward and shutting their doors to immigration and free trade. Against this backdrop, Canada accepts some 300,000 immigrants annually and faces pressure to increase its target. The Canadian population is increasingly diverse. According to the latest census, one-fifth of Canadians are visible minorities.

There is some agreement across the country that diversity is not only socially beneficial, but is also a competitive advantage. But until April 2017, when *The Diversity Dividend: Canada's Global Advantage* was published, there was little evidence to support this contention.

The history of *The Diversity Dividend* dates to April 2015, when the Pierre Elliott Trudeau Foundation launched an initiative to harness the expertise and the intellect of its scholars, fellows, and mentors around projects in three targeted areas of inquiry. Diversity, pluralism, and the future of citizenship was one of those areas, and 2015 fellow Bessma Momani and 2015 mentor Jillian Stirk were the first to respond to the call for proposals.

"If it weren't for Pierre Elliott Trudeau Foundation funding, we would never have conducted this research," says 2015 fellow and University of Waterloo professor Bessma Momani, an expert on global economic governance, Canadian foreign policy, the Arab spring, Arab-Canadians, and Arab youth. "Bessma and I had never met before," adds Jillian Stirk, a former Canadian ambassador to Norway. "If the Foundation hadn't paired us at the 2015 Summer Institute – Bessma as a fellow, me as a mentor – nothing would have brought us together." Retired after 30 years in the foreign service, Stirk has extensive experience in foreign policy and multilateral negotiations.

Dubbed "The Pluralism Project," Momani and Stirk's proposal was launched with a grant from The Pierre Elliott Trudeau Foundation, when *The Diversity Dividend* was still just an idea on a page. Momani explains, "The Foundation gave us the funding and the latitude to experiment. After consultations with a diverse group of researchers, economists, sociologists, and policy people, we realized that there was a lot of rhetoric about the idea that diversity was good for the country, but no proof. We discovered a real

gap in the knowledge about the link between diversity and economic prosperity. So we decided that this was what we would work on."

Momani and Stirk's research quickly struck a chord with stakeholders across the country. The University of Waterloo's Balsillie School of International Affairs, the International Migration Research Centre, the Simon Fraser University's Centre for Dialogue, the Centre for International Governance Innovation, the Global Centre for Pluralism, the Rotman School of Management, RBC Royal Bank, the Immigrant Employment Council of British Columbia, and the Chamber of Commerce of Metropolitan Montreal all joined the Foundation to collaborate on the project. The Panicaro Foundation made a generous financial contribution that paid for an economic analysis of the data and additional publication of the results.

"The Pierre Elliott Trudeau Foundation's support established the credibility of the project and helped open doors to a whole different set of audiences that we would not necessarily have reached otherwise. As we started to hold roundtables with businesses across the country, we met with a wide array of stakeholders – and we collected partners. At first, they approached us saying they didn't have money to contribute but were deeply interested in the initiative nonetheless. But in the end, six organizations contributed financially or in-kind to the project. That shows how important the issue is," says Stirk.

Drawing on statistical research, consultations with the business community and stakeholders, and a review of the academic literature, The Pluralism Project demonstrates a correlation between ethno-cultural diversity and increased productivity and revenue. In other words, businesses that welcomed diversity improved their bottom line.

More precisely, the study found that for every 1 percent increase in diversity, revenues in 14 sectors of the Canadian economy increase 2.4 percent. The relationship is strongest in cultural industries (6.2 percent), transportation (4.1 percent), and business services, including technology (3.6 percent). This leads the authors of *The Diversity Dividend* to state that “if Canada wants to succeed in the high value-added sectors of the future, workplace diversity is a game-changer and offers Canada a global advantage.”

The study analyzed data from more than 6000 businesses and employers from 14 sectors operating from coast to coast. The report and its eight recommendations are based on a quantitative analysis of the Statistics Canada Workplace and Employee Survey as well as consultations with the business community, academia, NGOs, and private and public stakeholders.

Momani and Stirk invested time and energy not only in research, but also in disseminating their findings and recommendations. Among other public presentations, their project, which took place over a year, was the topic of a *Big Thinking* Lecture on Parliament Hill in September 2017, held in partnership with the Federation for the Humanities and Social Sciences. Their findings were also featured in op-eds in *Policy Options*, the *Vancouver Sun*, and the *Globe and Mail*. Several Foundation scholars also contributed to the roundtables and published their own pieces in [OpenCanada.org](http://OpenCanada.org).

“The project went well beyond what was anticipated,” says Stirk, “and it had more impact than we had imagined at the outset – probably thanks to the funding model and the timeliness of the research. We had picked up on an issue that quickly moved to the top of the agenda after the US elections and Canada’s adoption of an increasingly public position in favour of diversity. We are still discovering people from all sectors who are interested in the study. We have had to reprint the report several times; it is available online in both official languages and we are constantly fielding requests to talk about our results.”

In Stirk’s mind, there is no question that the Foundation’s model of bringing researchers and practitioners together bears fruit. “As a former public servant, it felt important to have concrete recommendations to offer to the business community, policymakers, and civil society on how to reap the diversity dividend,” she observes. “Bessma brought academic rigour, while I kept saying that we needed outcomes and concrete conclusions. The creative tension between us shows in the quality of the final product.”

# Demanding fairness for youth aging out of care



**MELANIE DOUCET**, 2014 scholar  
Joint PhD Candidate in Social Work,  
McGill University and Université de Montréal  
Photo credit: Raul JR Campued

Melanie's voice fills with passion when she talks about her academic journey. "My advisors keep telling me that my PhD is just one step in my career, that it doesn't need to change the world," she says with incredulity. "But I *want* it to change the world. That's why I'm doing it."

It is November 2017 in Vancouver, British Columbia. Every Saturday for the past two months, 2015 Pierre Elliott Trudeau Foundation scholar Melanie Doucet has used a car-share to fetch recording and audio-visual equipment and sandwiches from points around the city. She then unloads them at a community centre as 9 to 11 young people make their way in by bus and SkyTrain from across the city. Recruited with posters, social media, presentations to youth groups and word of mouth, these youth aged 19 to 30 have an important experience in common with Melanie and with each other: all are former youth in care. All, upon reaching the age of majority, were turned out onto the streets of Canada, often with little more than a garbage bag full of clothes and papers, to begin adulthood without any of the support and networks that most Canadian teenagers take for granted. And all spend three hours on Saturday afternoons with Melanie and each other, sharing their experience.

The national statistics on youth who "age out" of care are arresting. Every year, British Columbia alone closes the files of some 1000 young wards of the Crown on their 19<sup>th</sup> birthday (other provinces age them out a year earlier). In 2013/2014, only 32% of these youth had completed a high school diploma, compared to 84% of 19-year-olds outside the care system. Struggling to continue their studies or keep a decent-paying job, less than one in five had a foster family or relatives they could live with, and within six months, many had found their way back onto BC statistics as recipients of income assistance. Death rates for young people who have aged out of care are 6.5 times higher than death rates for other youth.

"What makes Melanie's project unique is her lived experience," says Trilby Smith of the Vancouver Foundation. "She isn't an academic who parachutes

in to observe the youth. She is one of them. Many of these young people have experienced trauma and betrayal – moving from one foster home to the next, living in group homes where the only adults are shift workers. To them, Melanie is more than a survivor. She is someone they can trust."

Melanie's association with the Vancouver Foundation dates to the fall of 2016. A piece had been published in *The Globe and Mail* about Fostering Change, a Vancouver Foundation initiative that focuses on projects that help youth aging out of care. The Pierre Elliott Trudeau Foundation suggested that Melanie work with the initiative on a session at our annual conference in Vancouver about the strengths and challenges that researchers encounter when they develop and reform policy with, not only for, vulnerable populations. The result was an eye-opening 90-minute discussion and an op-ed – Melanie's first – in the *Vancouver Sun*.

"I could not have published that op-ed without the Pierre Elliott Trudeau Foundation's training," confides Melanie. "I published another article in *Policy Options* a few months later, and already I had a better idea of how to write it."

After the annual conference in Vancouver, Melanie went back to McGill and her research proposal. The next few months were hard.

"Initially, I was going to tack my doctoral research project onto a larger provincial project that will follow young people for five years before and after they age out of the Quebec care system. However, this project is all about statistics and is longitudinal. Statistics are important to expand our knowledge on aging out of care, but I wanted to work directly with youth to change outcomes. The youth can't afford to wait."

Finally, Melanie called time-out. She told her PhD committee that she needed to read and to reflect. She didn't know how she would structure her research, but she knew that their suggestions didn't feel right for her. And as the days slowly grew longer, she received a call from a Pierre Elliott Trudeau Foundation mentor.

"I was named British Columbia Active Representative for Children and Youth in November 2016 and was confirmed three months later," Bernard Richard explains. "When I accepted the position, I knew that one of my three priorities would be youth aging out of care. I also knew that Melanie was a Foundation scholar. So when I saw Melanie's op-ed, I thought that she could help."

Bernard's proposal to Melanie was simple: conduct your research in BC instead of Quebec, and the Representative's office would support the project financially and logistically. The Vancouver Foundation was contacted and had agreed to participate and manage the funds. And together, the two institutions would help ensure that the recommendations coming out of Melanie's research would receive attention from legislators.

What recommendations are those? "My research uses photovoice. The youth don't come just to talk: I hired a professional to train them in photography. So far, each of them has shared four photos that represent issues they are struggling with or things that are helping them with long-term supportive relationships. And I noticed right away that a lot of their photos are of their pets."

What Melanie says next is striking.

"Young people aging out of care find it really hard to secure housing. But the evidence about animal-assisted therapy is clear: pets are immensely valuable to people who are struggling with trauma. That's why so many young people on the streets keep dogs or cats. If they have to choose between homelessness and living without love, they often choose homelessness."

What's the solution? "Youth aging out of care should be able to register their pets as therapeutic or service animals," Melanie concludes. "It won't solve the housing shortage. But it might eliminate one barrier to housing, and help landlords understand that pet ownership is not always optional."

Melanie and her group's next recommendation is heartbreaking.

"When I was 15 and in foster care, my father passed away. I had to attend the funeral, and I knew that my former abuser would be there. I received no grief counselling during this time or afterwards, and my foster parents made me go right back to school the next week, even after I told them I needed more time to process everything and grieve." Melanie takes a breath. "Why was my foster family not counselled? This is something that has come out of the sessions as an issue that is still present to this day - there is no time and there are little to no resources to help youth properly grieve loss. Why is grief counselling still not

adequately provided to youth in care? The youth can't pay for it, so they're left to cope as best they can. This greatly impacts their ability to form lasting bonds with supportive people in their lives. It has to change."

Melanie and the young people - her co-researchers - will host a vernissage of the group's photos in a Vancouver gallery. Each young person will read out recommendations for policy change from among the ideas that continue to emerge from their weekly meetings. Media, legislators, and community groups have been invited, and Bernard Richard will encourage them to attend.

But the experience won't end there. The young people will take their photos home with them, and their photography and advocacy skills will be theirs to keep. One of the participants has already accepted an invitation from 2016 Foundation scholar Pauline Voon to speak about the research project, alongside Melanie, at the University of British Columbia. As for Melanie?

"One of the United States' most prominent researchers on youth aging out of care heard about my study and invited me to collaborate with her in Philadelphia. I am thinking about it, and considering it for a post-doc," she confides. "I'm also really interested in pursuing Phase II of this study, and continuing the research with the BC Representative for Children and Youth based on the youth's recommendations."

Melanie pauses. She ends simply: "I don't know what I'm going to do next exactly. But one thing I know for sure: if I did this work for the rest of my life, I'd be happy."

# Events and projects

This year, the Foundation hosted eight public interaction events and supported eight other events organized by its program recipients. The Foundation also continued to develop a new leadership curriculum and to implement alternative ways of learning, knowledge-sharing, and collaborating. In 2016-2017, the Foundation spent \$857,737 on the events and projects of its Public Interaction Program.

## EVENTS HOSTED BY THE FOUNDATION:

- Announcement of the 2016 fellows, Montréal, Quebec, 20 September 2016 (80 participants).
- Thirteenth Annual Pierre Elliott Trudeau Foundation Conference, “Building Community: Ideas for the Future of Citizenship and Belonging,” Vancouver, British Columbia, 16-17 November 2016 (200 participants). Partners: BMO Financial Group, McCall MacBain Foundation, McLean Group, Panicaro Foundation, Rennie Foundation.
- “How Ottawa Works: Points of Entry for Research and Evidence,” Ottawa, Ontario, 6-7 February 2017 (29 participants). Partner: International Development Research Centre.
- Media training workshop, Winnipeg, Manitoba, 6-7 May 2017 (35 participants). Partner: Aboriginal Peoples Television Network.
- Summer Institute, Winnipeg, Manitoba, 7-11 May 2017 (120 participants).
- “Timeline 150: Quebec, Canada, and the Weight of History,” Big Thinking Lecture by scholar Andréanne LeBrun and fellow Jocelyn Létourneau at the 2017 Congress for the Humanities and Social Sciences, Toronto, Ontario, 29 May 2017 (80 participants). Partners: Federation for the Humanities and Social Sciences, Ryerson University.
- “Engaged Scholarship, An Engaged Career,” career corner panel at the 2017 Congress for the Humanities and Social Sciences, Toronto, Ontario, 30 May 2017 (25 participants). Partners: Federation for the Humanities and Social Sciences, Ryerson University.
- “Understanding Washington: Change, Research and Institutions,” 12-13 June 2017 (21 participants). Partners: Embassy of Canada to the United States, World Bank Group, Brookings Institution.



### EVENTS SUPPORTED BY THE FOUNDATION:

- Scholars' workshop, "Social Science, Charter Litigation, and Policy Change," organized by scholars Lisa Kerr and Benjamin Perryman on 16 November 2016 (80 participants). Partner: Farris, Vaughan, Wills & Murphy LLP.
- Business roundtables in seven Canadian cities on the economic benefits of diversity, part of the targeted-area-of-inquiry initiative *The Pluralism Project* organized by fellow Bessma Momani and mentor Jillian Stirk between October 2015 and December 2016 (100 participants). Partners: See story on page 8.
- "Walrus Talks: We Desire a Better Country" talks by scholars Wendell Adjetey, Aaron Mills, and Zoe Todd, in Toronto, Surrey, and Yellowknife, respectively, between March and May 2017. Partner: The Walrus Foundation.
- "Growing Worker Power," workshop co-organized by scholar Anelyse Weiler in Vancouver, British Columbia, on 18 March 2017. Partner: Simon Fraser University.
- "Pluralism and Islam: Muslim Citizenship in Western Liberal Democracies," symposium co-organized by scholar Tammara Soma in Toronto, Ontario, on 20 March 2017. Partners: Massey College and Munk School of Global Affairs, University of Toronto.
- "Canada Drug Futures Forum," targeted-area-of-inquiry symposium organized by five scholars in Ottawa, Ontario, on 4-5 April 2017 (120 participants). Partners: visit [www.cdff-fadc.ca](http://www.cdff-fadc.ca).
- "The Diversity Dividend: Canada's Global Advantage," launch of the findings of the targeted-area-of-inquiry project *The Pluralism Project* in Ottawa, Ontario, on 24 April 2017. Partner: Centre for Global Pluralism.
- "Indigenous Peoples' Land Rights and the Roles of Ethnoecology and Ethnobotany," fellowship project of fellow Nancy Turner, in Victoria, British Columbia, on 2-5 May 2017. Partner: University of Victoria, Canada 150.

### THE FOUNDATION ALSO SUPPORTED SIX TARGETED-AREA-OF-INQUIRY PROJECTS ON DIVERSITY, PLURALISM, AND THE FUTURE OF CITIZENSHIP; INDIGENOUS RELATIONS IN CANADA; AND WATER, ENERGY, AND FOOD SECURITY.

- The Pluralism Project: Research on the economic benefits of diversity and public dissemination of the findings
- Canadian Drug Futures Forum: A multi-stakeholder forum to understand the impact of drug policy on marginalized communities and public dissemination of the findings
- Strengthening Food Security and Food Sovereignty in Northern Canada Through Fostering North-South Exchanges
- Muslim Canadian Youth Debate: Organizing conversations among 100 Muslim youth to understand their experiences of integration in Canada
- Revitalizing Anishnaabe Law: Learning how to engage members of the Couchiching First Nation in a respectful way, in order to enable an exchange of knowledge about Anishnaabe thought, governance, law, history, relationships, and ways of being and knowing
- Food Systems Lab: A one-year social innovation lab that brought together food system stakeholders and experts to create a better understanding of food waste in the City of Toronto and ways to reduce it

# Our scholars

This year, the Foundation selected its new 2017 scholars – a \$2.7 million commitment over up to four years to support 15 outstanding PhD students studying in Canada and abroad. All of the scholars are actively engaged in their fields and are expected to become leading figures within academia and beyond.

A total of 260 scholarship applications were considered in the 2017 competition. Universities submitted up to eight files each. Screening and interviews were conducted by external review committees.

The Pierre Elliott Trudeau Foundation scholarship provides \$40,000 per year for three years as base funding, plus up to \$20,000 per year in a research and travel allowance. Scholars may apply for funding for a fourth year. Scholars' research projects are related to one or more of the Foundation's four themes.

In 2016-2017, the Foundation funded 59 scholars from four cohorts, investing \$1.7 million in the Scholarship Program. As of 31 August 2017, we counted 157 alumni scholars.

## Active cohorts

### 2016

**Aytak Akbari-Dibavar**  
York University

**Samuel Blouin**  
Université de Montréal  
and Université de Lausanne

**Sébastien Brodeur-Girard**  
Université de Montréal

**Heather Bullock**  
McMaster University

**Christopher Campbell-Duruffé**  
University of Toronto

**Marie-Ève Desroches**  
Institut national de la  
recherche scientifique

**Anna Dion**  
McGill University

**Ido Katri**  
University of Toronto

**Gerard Kennedy**  
York University

**Gillian McKay**  
London School of Hygiene  
and Tropical Medicine

**Cynthia Morinville**  
University of Toronto

**Antoine Pellerin**  
Université Laval

**Cherry Smiley**  
Concordia University

**Jesse Thistle**  
York University

**Pauline Voon**  
University  
of British Columbia

### 2015

**Erin Aylward**  
University of Toronto

**Samara Brock**  
Yale University

**Avram Denburg**  
McMaster University

**Marie-France Fortin**  
University of Cambridge

**Bailey Gerrits**  
Queen's University

**William Hébert**  
University of Toronto

**Jennifer Jones**  
University of Guelph

**Andréanne LeBrun**  
Université de Sherbrooke

**Caroline Lieffers**  
Yale University

**Rebecca Nelems**  
University of Victoria

**Jennifer Peirce**  
City University  
of New York

**Benjamin Perryman**  
Yale University

**Tahnee Prior**  
University of Waterloo

**Meaghan Thumath**  
University of Oxford

**Ben Verboom**  
University of Oxford

**Anelyse Weiler**  
University of Toronto

### 2014

**Wendell Adjetej**  
Yale University

**Erika Bockstael**  
University of Manitoba

**Geoffrey Cameron**  
University of Toronto

**Melanie Doucet**  
McGill University and  
Université de Montréal

**Ali Hamandi**  
Harvard University

**Joanna Langille**  
University of Toronto

**Nathan Lemphers**  
University of Toronto

**Andrea Marston**  
University  
of California, Berkeley

**Aaron Mills**  
University of Victoria

**Jake Pyne**  
McMaster University

**Ayden Scheim**  
Western University

**Tammara Soma**  
University of Toronto

**Claudia Stoicescu**  
University of Oxford

**Rebecca Sutton**  
London School  
of Economics and  
Political Science

### 2013

**Gerald Bareebe**  
University of Toronto

**Sylvie Bodineau**  
Université Laval

**Chiara Camponeschi**  
University of Guelph

**Anna-Louise Crago**  
University of Toronto

**Kyle Kirkup**  
University of Toronto

**Ryan Liss**  
Yale University

**Logan Mardhani-Bayne**  
Yale University

**Jean Frédéric Ménard**  
University College London

**David Morgan**  
Dalhousie University

**Sophia Murphy**  
University  
of British Columbia

**Sara Pavan**  
Queen's University

**Robyn Sneath**  
University of Oxford

**Leah Trueblood**  
University of Oxford

**Emily K. White**  
New York University

## 2017 scholars

### FROM RIGHT TO LEFT:

**Sarah Mason-Case** (law and international relations, University of Toronto) examines how diverse communities of state and non-state actors, including civil advocates, Indigenous coalitions, and industry, engage in lawmaking practices that define the contours of international climate change law.

**Milad Parpouchi** (population and public health, Simon Fraser University) is investigating the factors that contribute to homelessness and the effectiveness of supported housing models in promoting social inclusion, recovery, and self-determination.

**Jamie Snook** (Indigenous health, University of Guelph) is researching relationships between public health and Indigenous co-management of fish and wildlife resources in Labrador's Inuit communities.

**Pierre Cloutier de Repentigny** (environmental law, University of Ottawa) critically analyzes rules under the law of the sea that protect marine biodiversity with a view to promoting a more sustainable relationship between marine life and humanity.

**Elena Waldispuehl** (political science, Université de Montréal) is exploring how social media is redefining collective action and how the digital world has affected activists' personal engagement, online and off-line.

**Benjamin Gagnon Chaine** (French-language literature, Université de Montréal and Université Paris 7) analyses the evolution of empathy and the patient-caregiver relationship through literary writings touching on AIDS and medical practices, starting at the end of the 19th century.

**Sophie de Saussure** (law, University of Ottawa) is exploring how courts might better take the interest of offenders' children into account when determining their sentences.

**Ryan Tonkin** (philosophy, University of Victoria) is examining the philosophical and legal justifications for tax proposals aimed at alleviating income inequality in Canada's democratic, multicultural context.

**Stephanie Lake** (population and public health, University of British Columbia) is investigating how the medical use and legalization of cannabis might help the ongoing opioid overdose crisis affecting British Columbia and the rest of Canada.

**Brett Schrewe** (educational studies, University of British Columbia) is drawing upon the history and design of medical education to re-imagine physician training with the goal of realizing the Canada Health Act's inherent promise of health equity.

**Stéphanie Roy** (administrative law, Université Laval) wants to redefine the obligations of the state towards the environment to reflect ethical guidelines and protect the environment for generations to come.

**Daniel Del Gobbo** (law, University of Toronto) is researching the role of alternative dispute resolution in addressing campus sexual violence in Canada.

**Vathsala Illesinghe** (policy studies, Ryerson University) is analyzing the migration trajectory of people who have moved from Sri Lanka to Canada to determine how immigration policies affect immigrant and refugee women's vulnerability to violence.

**Emma Swan** (international development and global studies, University of Ottawa) is exploring the relationship between violence, the construction of male gender identities, and peacebuilding in conflict settings.

**Ryan Beaton** (law, University of Victoria) is examining the role Canadian courts have adopted over the past several decades in trying to reconcile the prior existence of Indigenous societies with assertions of Crown sovereignty.



# Our fellows

This year, the Foundation appointed five 2017 fellows – committing \$1.1 million over three years to five outstanding Canadian intellectuals who have set themselves apart through their research achievements, their creativity, and their public engagement.

In 2017, 53 fellowship candidates were nominated by Canadian universities or by a Foundation fellow, scholar, or mentor. Screening was conducted by a peer-review committee.

Each Pierre Elliott Trudeau Foundation fellowship consists of a \$150,000 allowance for research, travel, and networking; a \$50,000 award; and a \$25,000 allowance to cover the cost of the fellow participating in Foundation events. The fellowship funds are disbursed over three years.

In 2016-2017, the Foundation supported 13 fellows from cohorts 2014 through 2016 and spent \$1 million on the Fellowship Program. As of 31 August 2017, we counted 50 alumni fellows.



## 2017 fellows

### FROM LEFT TO RIGHT:

**Claudia Mitchell**, *Education*, McGill University, Quebec – Under Professor Claudia Mitchell's project, girls from seven countries around the world will meet and produce photography or smartphone videos about ideas and best practices to combat sexual violence.

**Norman Vorano**, *Art History and Art Conservation, and the Agnes Etherington Art Centre*, Queen's University, Ontario – Professor Norman Vorano will create the Arctic Cultural Heritage Research Network, a single, culturally-appropriate web-based portal enabling Northerners to share cultural knowledge and empower their communities by accessing Arctic cultural heritage collections scattered in museums around the world.

**Karen Bakker**, *Geography*, University of British Columbia, British Columbia – Professor Karen Bakker and her team are working collaboratively with Indigenous communities, advisors, scholars, activists, and artists to exchange knowledge on how to decolonize water governance and improve water security for Indigenous peoples in Canada.

**Bernard Duhaime**, *Law*, Université du Québec à Montréal, Quebec – Professor Bernard Duhaime's project proposes to create a platform that will allow Canadians to learn from Latin American experiences protecting human rights and promoting reconciliation across nations.

**Audrey Macklin**, *Law, Criminology and Sociolegal Studies*, University of Toronto, Ontario – Professor Audrey Macklin's project examines private refugee sponsorship from sponsors' perspectives. Macklin will learn about the motivations, experiences, and perceptions of individual refugee sponsors, as well as how sponsorship affects and mobilizes them as citizens.

## Active cohorts

### 2016

**Adelle Blackett**  
McGill University  
**Deborah Cowen**  
University of Toronto  
**Catherine Potvin**  
McGill University  
**Poonam Puri**  
York University  
**Catriona Sandilands**  
York University

### 2015

**Jocelyn Downie**  
Dalhousie University  
**Bessma Momani**  
University of Waterloo  
**Cleo Paskal**  
University of Montréal  
**René Provost**  
McGill University  
**Nancy Turner**  
University of Victoria

### 2014

**Myriam Denov**  
McGill University  
**Evan Fraser**  
University of Guelph  
**Jason Edward Lewis**  
Concordia University



# Our mentors

This year, the Foundation appointed 11 mentors for 2017 – offering \$385,000 for two- or three-year terms to highly accomplished Canadians from diverse backgrounds who were paired with 2015 Foundation scholars to help the doctoral students connect to networks in the realms of policy, government, philanthropy, law, business, the arts, and journalism. A total of 52 mentorship nominations were examined by a peer-review committee.

The Pierre Elliott Trudeau Foundation mentorship honorarium consists of \$20,000 disbursed over two or three years, depending on a mentor's time commitment. Mentors also have access to a \$15,000 travel allowance to participate in Foundation learning events during their mandate.

In 2016-2017, the Foundation spent \$227,000 in the Mentorship Program to support 29 mentors from cohorts 2015 through 2017. As of 31 August 2017, we counted 106 alumni mentors.

## Active cohorts

### 2016

John A. Coleman  
Susan Delacourt  
Elaine Feldman  
Georgette Gagnon  
Michael Horgan  
Louis LeBel  
Jean Lebel  
Tony Penikett  
John Stackhouse  
Marie Wilson  
Victor C. Young

### 2015

Marie Deschamps  
Robert Fonberg  
John Fraser  
Ken Georgetti  
Robert P. Moody  
Stephen Owen  
Don Roberts  
Jillian Stirk  
Jennifer Stoddart

## 2017 mentors



**Manon Barbeau, Montréal, Québec** – Documentary filmmaker and entrepreneur Manon Barbeau has engaged with Indigenous youth using video and music creation to give voice to more than 40 communities in Canada and South America.



**Tim Brodhead, Metcalfe, Ontario** – Throughout his career in the nongovernmental sector, Tim Brodhead played a leadership role to support justice and social change initiatives in Canada and the Global South.



**Mel Cappe, Toronto, Ontario** – Professor at the University of Toronto, former high commissioner of Canada to the United Kingdom, clerk of the Privy Council, secretary to Cabinet, deputy minister, and former president of the Institute for Research on Public Policy, Mel Cappe provides strategic advice on a wide range of financial, environmental, and human resource development issues.



**Thomas Cromwell, Ottawa, Ontario** – As a former academic and retired Justice of the Supreme Court of Canada, Thomas Cromwell has worked to improve access to justice. He currently serves as chair of the Action Committee on Access to Justice in Civil and Family Matters and is counsel at Borden Ladner Gervais.



**Pauline d'Amboise, Lévis, Québec** – For more than 30 years, Pauline D'Amboise has spearheaded initiatives on corporate social responsibility, good governance, and ethics at Desjardins Group, the leading cooperative financial group in Canada. She is now secretary general and vice-president of governance and sustainable development at Desjardins.



**Barbara Doran, St. John's, Newfoundland and Labrador** – Filmmaker, activist, and businesswoman Barbara Doran is a pioneer in filmmaking in Newfoundland and Labrador. During her career, she covered a wide range of social issues, from violence against women to AIDS in South Africa.



**Hiromi Goto, Vancouver, British Columbia** – Through her creative work, author, editor, and teacher Hiromi Goto bridges cultures and experiences, and brings to the fore the importance of listening to historically marginalized voices.



**Sophie Pierre, Cranbrook, British Columbia** – Former chief of ?Aqam, St. Mary's Indian Band and former chief commissioner of the British Columbia Treaty Commission, Sophie Pierre is an accomplished Indigenous leader, distinguished for her commitment to First Nations' economic development.



**Valerie Pringle, Toronto, Ontario** – Following a 35-year career as a prominent broadcast journalist with CBC, CTV, and Discovery Channel Canada, Valerie Pringle now works as a volunteer board member and fundraiser for the Trans Canada Trail and the Centre for Addiction and Mental Health in Toronto.



**Lynn Smith, Vancouver, British Columbia** – Former British Columbia Supreme Court judge and executive director of the National Judicial Institute, Lynn Smith has been distinguished for the rigour of her judgments, one of which found the prohibition against physician-assisted dying to be constitutionally inoperative, a decision later upheld by the Supreme Court of Canada.



**Bruce Walsh, Regina, Saskatchewan** – Publisher Bruce Walsh is founding director of University of Regina Press, which has rewritten the script for academic and regional publishing and is recognized for award-winning books on Indigenous scholarship, languages, and culture.

# Our donors, partners, and friends

## DONORS

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Mental Health  
Centre for Dialogue, Simon  
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The Walrus Foundation  
The World Bank Group

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of the Scholarship File  
Review Committee  
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of the Scholarship File  
Review Committee  
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# Our governance and team

In accordance with the *Canada Not-for-Profit Corporations Act*, the Pierre Elliott Trudeau Foundation is governed by two bodies: the Foundation's members and its board of directors. A small but dedicated team delivers our programs and operations.

## MEMBERS

### REGULAR MEMBERS

Thomas S. Axworthy, Toronto, ON  
 William G. Davis, Toronto, ON  
 John English, Kitchener, ON  
 Ron Graham, Toronto, ON  
 Alex Himelfarb, Toronto, ON  
 Louise Houle, Montréal, QC  
 Edward Johnson, Montréal, QC  
 Marc Lalonde, Montréal, QC  
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 Laura-Julie Perreault, Montréal, QC  
 Roy J. Romanow, Saskatoon, SK  
 Peter Sahlas, Montréal, QC  
 Nancy Southam, Vancouver, BC  
 Janice Stein, Toronto, ON  
 Stephen J. Toope, Vancouver, BC

### GOVERNMENT-APPOINTED MEMBERS

Patricia Bovey,\* Winnipeg, MB  
 Dennis M. Browne, St. John's, NL  
 Eileen E. Gillese,<sup>†</sup> Toronto, ON

### SUCCESSION MEMBERS

Roy L. Heenan,<sup>‡</sup> Montréal, QC  
 Alexandre Trudeau, Montréal, QC  
 Justin Trudeau,<sup>§</sup> Ottawa, ON

\* Hon. Patricia Bovey resigned from the membership on 31 October 2016.

<sup>†</sup> Madam Justice Eileen Gillese resigned from the membership on 20 March 2017.

<sup>‡</sup> Mr. Roy L. Heenan died on 3 February 2017.

<sup>§</sup> Rt. Hon. Justin Trudeau has withdrawn from the affairs of the Foundation for the duration of his involvement in federal politics.

## DIRECTORS

### DIRECTORS ELECTED BY THE REGULAR MEMBERS

Michèle Audette, Québec, QC  
 Susan M.W. Cartwright, Ottawa, ON  
 Phil Fontaine, Akwesasne, ON  
 Suzanne Fortier, Montréal, QC  
 Alexander Himelfarb, Ottawa, ON  
 Edward Johnson, Montréal, QC  
 Megan Leslie, Halifax, NS  
 Jason Luckerhoff, Trois-Rivières, QC  
 John McCall MacBain, Geneva, Switzerland  
 David McLean, Vancouver, BC  
 Mélanie Millette,\* Montréal, QC  
 Farah Mohamed, London, United Kingdom  
 Patrick Pichette, Palo Alto, California  
 Sean E. Riley, Antigonish, NS  
 Chuck Strahl,<sup>†</sup> Chilliwack, BC

### DIRECTOR ELECTED BY THE GOVERNMENT-APPOINTED MEMBERS

Marc Renaud, Montréal, QC

### DIRECTORS ELECTED BY THE LIQUIDATORS OF THE SUCCESSION OF THE LATE RT. HON. PIERRE ELLIOTT TRUDEAU

Roy L. Heenan,<sup>‡</sup> Montréal, QC  
 Peter Sahlas,<sup>§</sup> Montréal, QC  
 Alexandre Trudeau, Montréal, QC

\* Dr. Mélanie Millette joined the Board of Directors on 15 March 2017.

<sup>†</sup> Hon. Chuck Strahl resigned from the Board of Directors on 24 November 2016.

<sup>‡</sup> Mr. Roy L. Heenan died on 3 February 2017.

<sup>§</sup> Mr. Peter Sahlas joined the Board of Directors on 27 February 2017.

## TEAM

Morris Rosenberg, President and Chief Executive Officer  
 Élise Comtois, Executive Director  
 Gwenola Appéré, Program Officer, Communications and Public Interaction  
 Gina Beltrán, Program Officer, Leadership and Public Interaction  
 Marko de Guzman, Assistant, Outreach and Governance  
 Natalka Haras, Director of Development – on parental leave  
 Jennifer Petrela, Director of Content and Strategic Engagement  
 Catalina Pintos Chew, Administrative Assistant (Programs)  
 Elizabeth Rivera, Assistant Director (Administration)  
 Sarah Saublet, Program Officer, Fellowships and Mentorships  
 Josée St-Martin, Program Director, Scholarships

The Foundation also thanks Sarah Kamal, Emily Jensen, Maxime Olsen, Elise La Rivière-Morin, Norah Cyprien, Illa Rodriguez, and Diana Torres for their help this year.

# Our plans for 2017-2018

## NEXT YEAR, WE INTEND:

- To appoint up to fifteen new scholars, ten new mentors, and five new fellows.
- To continue to support research and learning initiatives related to our fellows' projects, the Foundation's four original themes, and our three targeted areas of inquiry.
- To continue our objective to increase our community's engagement with civil society, the public service, and the private sector.
- To continue to develop and implement a leadership skills development curriculum building on our scholars', fellows', and mentors' capacity to address complex matters of importance to Canada and the world.
- To continue to find ways to increase our programs' impact so that our scholars, fellows, and mentors inform sound public discourse.
- To continue to take steps to ensure the Foundation's financial sustainability in support of current and future initiatives.

# Financial Statements

## 31 August 2017

# Independent Auditor's Report

November 15, 2017

To the Directors of  
La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation

We have audited the accompanying financial statements of La Fondation Pierre Elliott Trudeau/The Pierre Elliott Trudeau Foundation, which comprise the statement of financial position as at August 31, 2017 and the statements of changes in net assets, revenues and expenses and cash flows for the year then ended, and the related notes, which comprise a summary of significant accounting policies and other explanatory information.

## MANAGEMENT'S RESPONSIBILITY FOR THE FINANCIAL STATEMENTS

Management is responsible for the preparation and fair presentation of these financial statements in accordance with Canadian accounting standards for not-for-profit organizations, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

## AUDITOR'S RESPONSIBILITY

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with Canadian generally accepted auditing standards. Those standards require that we comply with ethical requirements and plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control.

An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

## OPINION

In our opinion, the financial statements present fairly, in all material respects, the financial position of La Fondation Pierre Elliott Trudeau/The Pierre Elliott Trudeau Foundation as at August 31, 2017 and the results of its operations and its cash flows for the year then ended in accordance with Canadian accounting standards for not-for-profit organizations.

*PricewaterhouseCoopers s.r.l./s.e.n.c.r.l.*<sup>1</sup>

PricewaterhouseCoopers LLP/s.r.l./s.e.n.c.r.l.  
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"PwC" refers to PricewaterhouseCoopers LLP, an Ontario limited liability partnership.

<sup>1</sup> CPA auditor, CA, public accountancy permit No. A116819

# Statement of Financial Position

As at August 31, 2017

	2017	2016
	\$	\$
<b>Assets</b>		
<b>Current assets</b>		
Cash and cash equivalents	1,442,952	1,078,781
Short-term investments (note 4)	-	6,196,836
Investments at fair value (note 5)	-	1,114,893
Interest receivable	-	880,887
Prepaid expenses and other receivables	202,578	190,527
	1,645,530	9,461,924
<b>Investments at fair value</b> (note 5)	145,009,963	145,227,155
<b>Property and equipment</b> (note 6)	606,021	706,684
<b>Intangible assets</b> (note 7)	7,286	9,108
	147,268,800	155,404,871

## Liabilities

<b>Current liabilities</b>		
Accounts payable and accrued liabilities	2,351,065	2,793,477
Current portion of deferred donations (note 8)	-	103,000
Current portion of fellowships payable (note 9 a))	1,009,554	903,352
Current portion of scholarships payable (note 9 b))	1,373,828	1,417,787
Current portion of mentorships payable (note 9 c))	103,418	97,660
	4,837,865	5,315,276
<b>Deferred donations</b> (note 8)	238,810	102,055
<b>Fellowships payable</b> (note 9 a))	483,217	497,366
<b>Scholarships payable</b> (note 9 b))	2,506,044	2,287,767
<b>Mentorships payable</b> (note 9 c))	155,214	103,684
	3,383,285	2,990,872
	8,221,150	8,306,148

## Net Assets

<b>Net assets restricted for endowment purposes</b> (notes 3 and 10)	125,000,000	125,000,000
<b>Net assets invested in property and equipment and intangible assets</b> (notes 3, 6 and 7)	614,133	716,618
<b>Internally restricted net assets</b> (notes 3 and 11)	10,697,749	18,833,203
<b>Unrestricted net assets</b> (notes 3 and 12)	2,735,768	2,548,902
	139,047,650	147,098,723
	147,268,800	155,404,871

# Statement of Changes in Net Assets

For the year ended  
August 31, 2017

					2017	2016
	Restricted for endowment purposes	Invested in property and equipment and intangible assets	Internally restricted	Unrestricted	Total	Total
	\$ (notes 3, 10)	\$ (notes 3, 6, 7)	\$ (notes 3, 11)	\$ (notes 3, 12)	\$	\$
<b>Balance – Beginning of year</b>	125,000,000	716,618	18,833,203	2,548,902	147,098,723	149,987,601
Excess of revenues over expenses (expenses over revenues) for the year	-	(104,715)	(8,099,469)	153,111	(8,051,073)	(2,888,878)
Transfers	-	-	(33,755)	33,755	-	-
Investment in property and equipment and intangible assets	-	2,230	(2,230)	-	-	-
<b>Balance – End of year</b>	125,000,000	614,133	10,697,749	2,735,768	139,047,650	147,098,723

# Statement of Revenues and Expenses

For the year ended  
August 31, 2017

	2017	2016
	\$	\$
<b>Revenues</b>		
Investment revenue	3,884,909	3,618,791
Net loss on disposal of investments at fair value	(6,106,560)	(275,714)
Net unrealized gain (loss) on investments at fair value	(86,129)	414,213
Donations (note 17)	359,710	731,753
	<u>(1,948,070)</u>	<u>4,489,043</u>
<b>Expenses</b>		
Public Interaction Program (note 16 b)	857,737	2,220,690
Fellowship Program	994,827	1,011,684
Scholarship Program	1,760,117	1,748,617
Mentorship Program	226,899	227,439
Administration (note 18)	406,381	390,545
Program planning and delivery (note 18)	1,365,210	1,358,697
Outreach and development (note 18)	164,533	124,183
Investment counsel fees	327,299	296,066
	<u>6,103,003</u>	<u>7,377,921</u>
<b>Excess of expenses over revenues for the year</b>	<u>(8,051,073)</u>	<u>(2,888,878)</u>

# Statement of Cash Flows

For the year ended  
August 31, 2017

	2017	2016
	\$	\$
<b>Cash flows from</b>		
<b>Operating activities</b>		
Excess of expenses over revenues for the year	(8,051,073)	(2,888,878)
Items not affecting cash and cash equivalents		
Net loss on disposal of investments at fair value	6,106,560	275,714
Net unrealized loss (gain) on investments at fair value	86,129	(414,213)
Amortization of property and equipment	102,893	105,359
Amortization of intangible assets	1,822	2,277
	(1,753,669)	(2,919,741)
Changes in non-cash working capital components		
Decrease (increase) in		
Interest receivable	880,887	59,033
Prepaid expenses and other receivables	(12,051)	405,185
Increase (decrease) in		
Accounts payable and accrued liabilities	(442,412)	892,861
Deferred donations	33,755	100,814
Fellowships, scholarships and mentorships payable	323,659	616,973
	783,838	2,074,866
	(969,831)	(844,875)
<b>Investing activities</b>		
Purchase of short-term investments	(19,999,985)	(46,748,700)
Proceeds on disposal of short-term investments	26,190,481	40,851,619
Purchase of investments at fair value	(225,889,295)	(86,726,460)
Proceeds on disposal of investments at fair value	221,035,031	93,971,619
Purchase of property and equipment	(2,230)	(10,116)
	1,334,002	1,337,962
<b>Net change in cash and cash equivalents during the year</b>	<b>364,171</b>	<b>493,087</b>
<b>Cash and cash equivalents – Beginning of year</b>	<b>1,078,781</b>	<b>585,694</b>
<b>Cash and cash equivalents – End of year</b>	<b>1,442,952</b>	<b>1,078,781</b>



# Notes to Financial Statements

August 31, 2017

## 1 Purpose

La Fondation Pierre Elliott Trudeau/The Pierre Elliott Trudeau Foundation (the “Foundation”) was incorporated on February 7, 2001 under Part II of the Canada Corporations Act and began operations in March 2002. On May 31, 2014, the Foundation continued under Section 211 of the Canada Not-for-Profit Organizations Act. The Foundation has been a registered charity under the Income Tax Act since January 22, 2003.

The Foundation is an independent and non-partisan charity established in 2001 as a living memorial to the former prime minister. In 2002, with the support of the House of Commons, the Government of Canada endowed the Foundation with the Advanced Research in the Humanities and Human Sciences Fund. The Foundation also benefits from private donations. By granting doctoral scholarships, awarding fellowships, appointing mentors and holding public events, the Foundation encourages critical reflection and action in four areas important to Canadians: human rights and dignity, responsible citizenship, Canada’s role in the world, and people and their natural environment.

## 2 Significant accounting policies

### FINANCIAL INSTRUMENTS

Financial assets are initially recorded at their fair value, and their revaluation depends on their classification, as described hereafter. Classification depends on when the financial instrument was acquired or issued, its characteristics and its designation by the Foundation. Settlement date accounting is used. Financial liabilities are recorded at cost.

Cash and cash equivalents, short-term investments and investments at fair value are classified as “held-for-trading assets”. They are presented at fair value, and gains or losses related to the revaluation at the end of each year are included in revenues and expenses. Transaction costs are recognized in the statement of revenues and expenses when they occur.

Interest receivable and prepaid expenses and other receivables are classified as “loans and receivables”. After being initially recorded at fair value, they are evaluated at cost after amortization using the effective interest rate method. For the Foundation, amortized cost is generally cost because of the assets’ short term maturity.

Accounts payable and accrued liabilities and long-term liabilities are classified as “other financial liabilities”. They are initially evaluated at fair value, and future evaluations are done at cost after amortization using the effective interest rate method. For the Foundation, amortized cost is generally cost because of the liabilities’ short-term maturity, except for certain long-term liabilities which are recorded at the discounted value at initial recognition.

### MANAGEMENT ESTIMATES

The preparation of financial statements in conformity with Canadian accounting standards for not-for-profit organizations requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the year. Actual results could differ from those estimates.

### CASH AND CASH EQUIVALENTS

Cash and cash equivalents consist of deposits with a major financial institution and balances in the investment portfolios.

### REVENUE RECOGNITION

#### DONATIONS

The Foundation uses the deferral method of accounting for donations. Restricted donations are recognized as revenue in the year in which the related expenses are incurred. Unrestricted donations are recognized as revenue when received or receivable if the amount to be received can be reasonably estimated and collection is reasonably assured.

#### INTEREST

Interest is recorded on an accrual basis when collection is considered probable.

#### GAINS AND LOSSES ON DISPOSAL OF INVESTMENTS AT FAIR VALUE

Gains and losses on disposal of investments at fair value are recorded at the date of sale and represent the difference between the sale proceeds and the cost.

### FELLOWSHIP, SCHOLARSHIP AND MENTORSHIP PROGRAMS

Fellowships, scholarships and mentorships are recorded as liabilities and expensed in the year of approval. Ongoing monitoring of the programs occurs on a continuing basis as part of an overall commitment to accountability. Since these programs are multi-year commitments, changes in amounts committed are adjusted in the year in which they occur.

### PROPERTY AND EQUIPMENT

Property and equipment are stated at cost less amortization.

Amortization is provided for using the declining balance method over the estimated useful lives of the assets at the following rates:

Office communication equipment	20%
Furniture and fixtures	20%
Computer equipment	25% to 33%

Leasehold improvements are amortized on a straight-line basis over the ten-year term of the lease ending September 30, 2023

Artwork is not amortized because the useful life is virtually unlimited.

### INTANGIBLE ASSETS

Intangible assets consist of computer software, which is recorded at cost and amortized at a rate of 20%.

### IMPAIRMENT OF LONG-LIVED ASSETS

The Foundation reviews, when circumstances indicate it to be necessary, the carrying values of its long-lived assets by comparing the carrying amount of the asset or group of assets to the expected future undiscounted cash flows to be generated by the asset or group of assets. An impairment loss is recognized when the carrying amount of an asset or group of assets held for use exceeds the sum of the undiscounted cash flows expected from its use and eventual disposition. The impairment loss is measured as the amount by which the asset's carrying amount exceeds its fair value based on quoted market prices, when available, or on the estimated current value of future cash flows.

### 3 Capital disclosures

As at August 31, 2017, the Foundation's capital structure consists of a \$125,000,000 Endowment Fund granted in perpetuity by the Government of Canada in 2002 (note 10), internally restricted assets of \$10,697,749 (2016 – \$18,833,203) (note 11), net assets invested in property and equipment and intangible assets of \$614,133 (2016 – \$716,618) (notes 6 and 7) and unrestricted net assets of \$2,735,768 (2016 – \$2,548,902) (note 12).

The funding agreement with the Government of Canada on the Advanced Research in the Humanities and Human Sciences Fund stipulates that the original endowment may not be spent, but that the income generated may be used for the Foundation's purposes. Accordingly, the Foundation manages its capital with the objectives of:

- preserving the original capital of the endowment;
- protecting the endowment from inflationary impacts;
- funding current and future operations;
- ensuring that the Foundation is able to meet its financial obligations as they come due; and
- safeguarding the Foundation's ability to continue developing its programs in the long term.

### 4 Short-term investments

Further to the transition to the new investment policy (note 5), no short-term investments were held as at August 31, 2017. In 2016, short-term investments consisted of Canadian-dollar-denominated treasury bonds bearing interest at floating rates between 0.47% and 0.53% and maturing between September 8, 2016 and November 3, 2016.

### 5 Investments at fair value

In 2017, the Foundation developed a new Statement of Investment Policies and Procedures consistent with the current directives of the Minister of Finance on endowment investment, which was approved by the Department of Finance on March 28, 2017. The Foundation started transitioning its portfolios shortly after investment guidelines, included in the funding agreement with the Government of Canada on the Advanced Research in the Humanities and Human Sciences Fund, were amended on July 18, 2017. Like other organizations endowed by the Government of Canada, the Foundation will now be allowed to manage the fund according to a diversified investment policy. Given the greater complexity of the portfolio and the limited administrative capacity of the Foundation, the Finance and Investment Committee uses delegated investment services to assist the Foundation in the transition. A phased implementation plan over five quarters starting August 1, 2017 is in progress. According to this plan, securities held in the Foundation's two investment portfolios were liquidated between August 21, 2017 and August 24, 2017. The proceeds from the disposal were temporarily reinvested in bond market securities before they are to be gradually re-invested in fixed-income securities, equities and alternative assets according to the new investment policy.

As at August 31, 2017, investments at fair value consist of one Canadian short-term investment fund invested in money market instruments and one Canadian bond pooled fund invested in a variety of securities of Canadian governments and corporations rated no lower than "BBB" by at least two of the four main credit rating agencies.

As at August 31, 2017, in accordance with Canadian accounting standards, investments at fair value are presented as "long-term assets" because pooled funds do not have maturity dates. In 2016, investments at fair value consisted of debt securities of Canadian governments and corporations with maturity dates of which the current portion was presented in current assets.

	2016			
	Less than 1 year	From 1 to 5 years	More than 5 years	Total
	\$	\$	\$	\$
Fair Value	1,114,893	66,018,994	79,208,161	146,342,048
Par value	1,108,000	63,120,000	72,019,000	136,247,000
Weighted average yield	1,24 %	2,67 %	2,19 %	2,40 %

## 6 Property and equipment

			2017	2016
	Cost	Accumulated amortization	Net	Net
	\$	\$	\$	\$
Office communication equipment	42,775	29,778	12,997	16,246
Furniture and fixtures	126,935	103,068	23,867	29,835
Computer equipment	125,284	105,420	19,864	24,004
Leasehold improvements	873,058	341,948	531,110	618,416
Artwork	18,183	-	18,183	18,183
	1,186,235	580,214	606,021	706,684

## 7 Intangible assets

			2017	2016
	Cost	Accumulated amortization	Net	Net
	\$	\$	\$	\$
Computer software	62,051	54,765	7,286	9,108

## 8 Deferred donations

Deferred donations consist of restricted donations that will be used to cover charges related to special initiatives.

	2017	2016
	\$	\$
<b>Balance - Beginning of year</b>	205,055	104,241
Donations deferred during the year	70,000	103,000
Less: Amount recognized as revenue during the year	36,245	2,186
<b>Balance - End of year</b>	<b>238,810</b>	<b>205,055</b>
Current portion of deferred donations	-	103,000
Long-term portion of deferred donations	238,810	102,055
	238,810	205,055

## 9 Long-term liabilities

### a) Fellowships payable

	2017	2016
	\$	\$
Current portion of fellowships payable	1 009,554	903,352
Long-term portion of fellowships payable in years ending August 31,		
2018	-	357,653
2019	363,783	139,713
2020	119,434	-
	483,217	497,366
	1,492,771	1,400,718

### b) Scholarships payable

	2017	2016
	\$	\$
Current portion of scholarships payable	1,373,828	1,417,787
Long-term portion of scholarships payable in years ending August 31,		
2018	-	1 181,211
2019	1,104,286	822,754
2020	1,088,758	283,802
2021	313,000	-
	2,506,044	2,287,767
	3,879,872	3,705,554

### c) Mentorships payable

	2017	2016
	\$	\$
Current portion of mentorships payable	103,418	97,660
Long-term portion of mentorships payable in years ending August 31,		
2018	-	52,456
2019	155,214	51,228
	155,214	103,684
	258,632	201,344

Non-cash interest expenses included in program expenses bearing interest at a rate of 1.53% (2016 - 2.40%), calculated using the effective interest rate method, are as follows:

	2017	2016
	\$	\$
Fellowship Program	33,757	29,752
Scholarship Program	89,866	83,115
Mentorship Program	5,498	3,100
	129,121	115,967

## 10 Net assets restricted for endowment purposes

In March 2002, the Foundation entered into a funding agreement with the Government of Canada whereby the Government granted an endowment of \$125,000,000 to the Foundation for the purpose of establishing the Advanced Research in Humanities and Human Sciences Fund (the Fund). In the event of a default by the Foundation, the Government of Canada may terminate the funding agreement and require the Foundation to repay funds not otherwise committed. According to the funding agreement, the endowment bears no interest and must be capitalized in perpetuity.

## 11 Internally restricted net assets

In 2002, the Foundation's Board of Directors placed internal restrictions on a portion of the excess of revenues over expenses in any given year. More precisely, the Board decided that an annual amount of \$1,875,000 would be restricted and capitalized to protect the endowment as described in note 3.

In April 2013, the Board decided not to capitalize any amount when the results of a fiscal year were deficient.

Beginning September 1, 2015, the Foundation has applied its internally restricted net assets against the excess of expenses over revenues not otherwise covered by the cumulative growth of the Fund (note 12). As at August 31, 2017, the internally restricted net assets amounted to \$10,697,749 (2016 – \$18,833,203).

## 12 Unrestricted net assets

Unrestricted net assets are the sum of all excess revenues over expenses accumulated over the years after deducting net assets invested in property and equipment and intangible assets, and after deducting all internally restricted funds. Historically, unrestricted net assets had two sources: the cumulative growth of the Endowment Fund and the Private Donation Fund.

The cumulative growth of the Endowment Fund refers to the balance left in unrestricted net assets of the Endowment Fund after deducting net transfers to the Private Donation Fund. In the year ended August 31, 2016, the residual cumulative growth of the Endowment Fund, together with certain internally restricted net assets (note 11), were applied to offset the excess in the year's expenses over revenues. This reduced the cumulative growth of the Endowment Fund to zero.

The Private Donation Fund consists of private donations received by the Foundation, net of outreach and development costs (note 18), plus investment revenues generated by the donations, net of investment management fees. The Private Donation Fund is distinct from the Endowment Fund and is not subject to the funding agreement with the Government of Canada (note 10). In the year ended August 31, 2017, unrestricted net assets were sourced exclusively from the Private Donation Fund.

In the year ending August 31, 2017, the Foundation transferred the amount of \$33,755 (2016 – \$208,736), consisting of deferred donations, from internally restricted net assets to the Private Donation Fund (note 8).

Also in 2017, \$30,000 was drawn from the Private Donation Fund to cover expenses in excess of the ceiling on operating costs imposed by the Foundation's funding agreement with the Government of Canada. This transfer followed a decision that as of September 1, 2016, such expenses might be covered by the Private Donation Fund at year-end.

As at August 31, 2017, unrestricted net assets amounted to \$2,735,768 (2016 – \$2,548,902).

	2017	2016
	\$	\$
Cumulative growth of the Endowment Fund	-	-
Private Donations Fund	2,735,768	2,548,902
<b>Total unrestricted net assets</b>	<b>2,735,768</b>	<b>2,548,902</b>

## 13 Interest rate risk

The Foundation's exposure to interest rate risk is as follows:

Cash and cash equivalents	Floating rate
Short-term investments	Floating rate
Investments at fair value	Fixed rates
Interest receivable, prepaid expenses and other receivables and all liabilities	Non-interest bearing

## 14 Credit risk

The Foundation holds investments in one Canadian short-term investment fund and one Canadian bond pooled fund as described in note 5 and reduces the credit risk by dealing with creditworthy counterparties. The Finance and Investment Committee monitors these investments for credit risk on an ongoing basis. As at August 31, 2017, management does not believe the Foundation is exposed to significant credit risk.

## 15 Commitments

- a) The maximum amounts committed to research, travel and networking are related to scholarship cohorts 2014 to 2016 for their fourth-year allowances and to all 2017 cohorts – fellowships, scholarships and mentorships – which, unlike previous cohorts, can no longer defer their unspent allowances (note 16).

		\$
Years ending August 31,	2018	580,000
	2019	368,000
	2020	425,000
	2021	195,000

- b) Future minimum rental payments under operating leases and other contractual engagements for the next five years are as follows:

		\$
Years ending August 31,	2018	208,000
	2019	206,500
	2020	224,000
	2021	208,200
	2022	208,200

- c) For the year ending August 31, 2017, there is no commitment related to Public Interaction Program events (2016 – \$33,900).

## 16 Public Interaction Program

The Public Interaction Program (PIP) brings together all the Foundation's current and past awardees: fellows, scholars and mentors. The program supports their engagement to discuss issues in the four priority areas identified by the Foundation. The annual budget for the PIP is approved by the Board of Directors at its spring meeting. The program has two distinct components:

- a) Research, travel and networking expenses consist of allowances granted to program beneficiaries – mentors, fellows and scholars – to work together on joint projects, participate in the Foundation's events and disseminate their research findings and ideas. Research, travel and networking expenses incurred by the program beneficiaries are reimbursed in accordance with Foundation policies set out in the PIP documentation.

To support the Foundation's continuous effort to play a more active role on issues of importance to Canada and the world, program beneficiaries were previously offered the opportunity to use their allowance to participate in the PIP beyond the formal term of their award. This was effective for the 2015 and 2016 scholar cohorts and the 2014 to 2016 fellow cohorts.

In 2017, this practice was discontinued and was not offered to 2017 scholar, fellow and mentor cohorts. In 2017, the Foundation awarded 5 fellowships, 15 scholarships and 11 mentorships (2016 – 5 fellowships, 15 scholarships and 11 mentorships).

- b) The PIP also provides financial and logistical support for a series of events and activities, initiated by the Foundation or organized in partnership, that aim to provide opportunities to generate knowledge, learn and exchange ideas:

	2017	2016
	\$	\$
Research, travel and networking	434,931	1 656,728
Events and other activities	422,806	563,962
	<u>857,737</u>	<u>2 220,690</u>

## 17 Donations

	2017	2016
	\$	\$
Donations received during the year	393,465	1,232,567
Less: Donations receivable in prior year	-	400,000
Less: Donations deferred during the year (note 8)	70,000	103,000
	<u>323,465</u>	<u>729,567</u>
Plus: Amount recognized as revenue during the year (note 8)	36,245	2,186
Donation income for the year	<u>359,710</u>	<u>731,753</u>

Donations made by directors, members, officers and related parties totalled \$216,807 for the year ended August 31, 2017 (2016 – \$564,962).

## 18 Schedule of expenses

	Administration		Program planning and delivery		Outreach and development		Total	
	2017	2016	2017	2016	2017	2016	2017	2016
	\$	\$	\$	\$	\$	\$	\$	\$
Salaries and benefits	107,581	106,801	1,035,445	1,008,679	60,980	71,201	1,204,006	1,186,681
Professional fees	206,914	177,240	1,525	20,077	-	-	208,439	197,317
Rent and occupancy costs	16,045	16,565	172,492	156,449	12,034	11,043	200,571	184,057
Office expenses	5,204	5,024	55,912	47,427	3,901	3,348	65,017	55,799
Amortization of property and equipment	8,231	9,482	88,488	89,555	6,174	6,322	102,893	105,359
Amortization of intangible assets	146	205	1,567	1,935	109	137	1,822	2,277
Software	-	-	-	18,889	-	-	-	18,889
Bank charges	34	41	1,037	411	72	29	1,143	481
Meetings and travel	85,554	54,490	-	-	-	-	85,554	54,490
Outreach and communications	-	-	8,744	3,165	51,263	32,103	60,007	35,268
Contractual	-	-	-	12,110	-	-	-	12,110
Other employee expenses	6,672	20,697	-	-	-	-	6,672	20,697
Administration expenses covered by Private Donation Fund (note 12)	(30,000)	-	-	-	30,000	-	-	-
	<u>406,381</u>	<u>390,545</u>	<u>1,365 210</u>	<u>1,358,697</u>	<u>164,533</u>	<u>124,183</u>	<u>1,936,124</u>	<u>1,873,425</u>

To reflect the charitable mandate of the Foundation, expenses are distributed between administration, program planning and delivery, and outreach and development.

Outreach and development costs are covered by the Private Donation Fund (note 12), while administration and program planning and delivery costs are covered by the Endowment Fund.

Salaries and benefits, rent and occupancy costs, office expenses, amortization, bank charges and recruitment costs are allocated to the above-mentioned cost centres in proportion to the hours worked.