

The Pierre  
Elliott Trudeau  
Foundation  
2009-2010  
Annual Report

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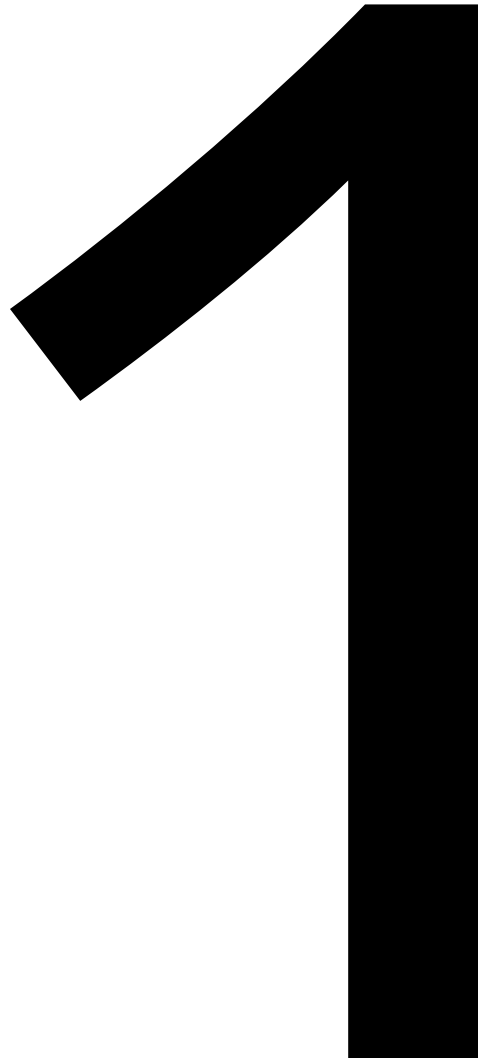
Looking  
back

Looking back –  
Achievements in 2009-2010

The Foundation successfully delivered on all  
commitments made in its 2009-2010 Business Plan.

Selected fifteen new 2010  
Trudeau Scholars

a \$2.7 million commitment over  
up to four years to support a group  
of fifteen outstanding Canadian and  
foreign Ph.D. students actively  
engaged in their fields and expected  
to become leading national and  
international figures. This year, the  
Foundation funded 64 Scholars.



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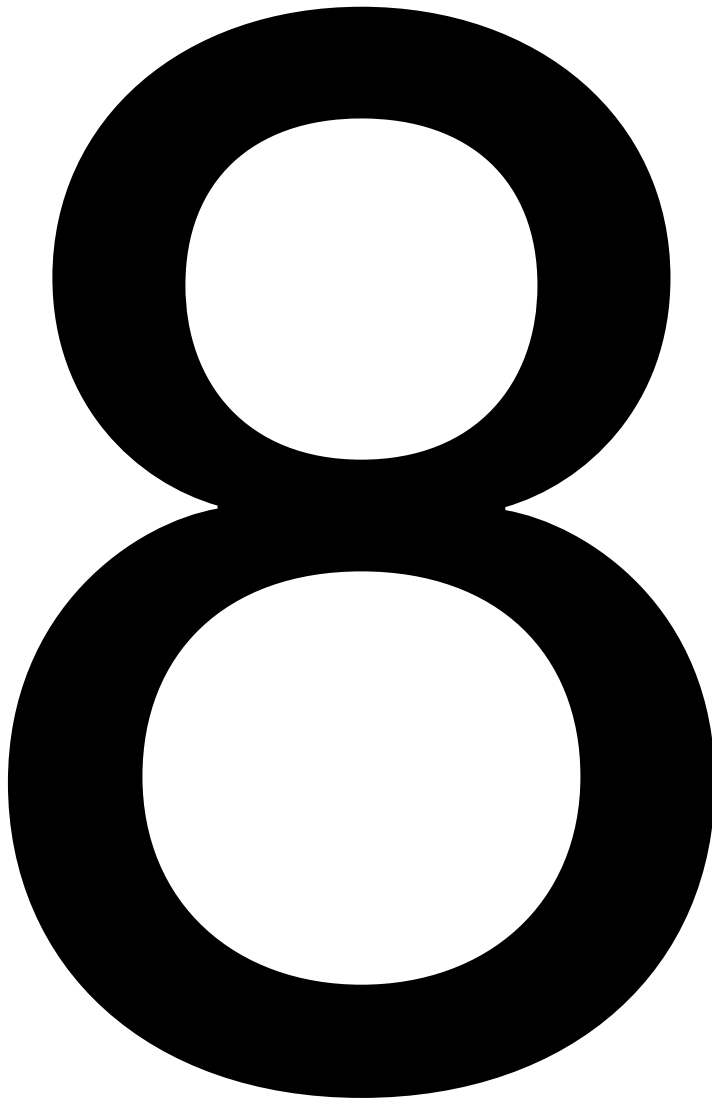
## Appointed four 2010 Trudeau Fellows

including a first national Visiting Trudeau Fellow — an investment of 900,000 over three years in four outstanding Canadians — three academics and one intellectual from the arts — who have set themselves apart through their research achievements, creativity, and social commitment. This year, the Foundation supported fourteen Fellows.

Appointed ten 2010 Mentors

offering \$350,000 for eighteen months to ten highly accomplished Canadians from diverse backgrounds who have been paired with 2008 Trudeau Scholars to help them connect with policy networks. Twenty Mentors were enrolled in the Mentoring program this year.

10



Held eight major Public Interaction events, in addition to six other events



organized by Trudeau community Members or with other external partners and sponsored by the Foundation.

6

In addition, we:

- Sustained our knowledge dissemination efforts
- Continued to implement the 2009 Distinguished Review Panel's recommendations

Streamlined our  
governance process

Developed a new  
Strategic Plan for  
2010-2015

Adopted a sound  
and actionable  
fundraising strategy

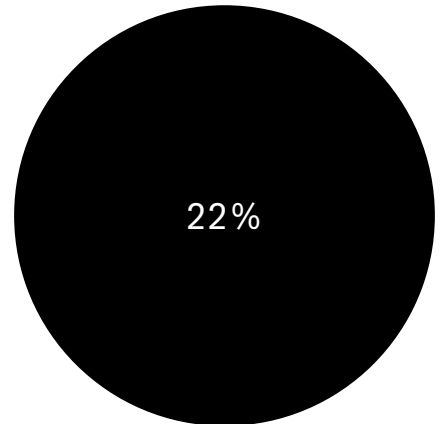
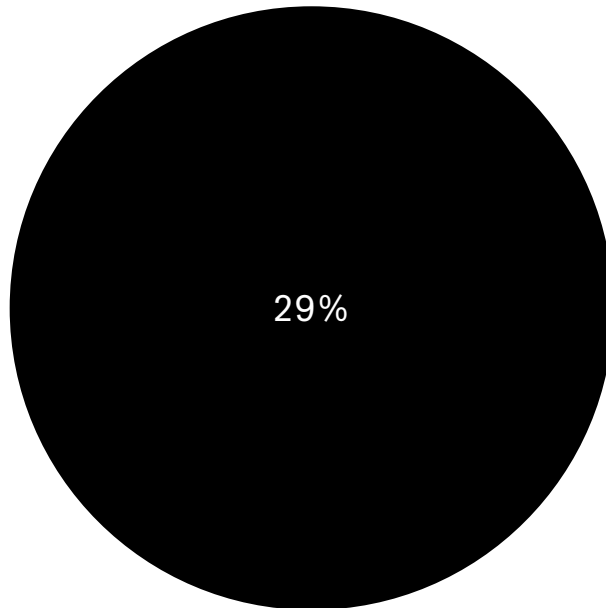
Stepped up discussions  
with Canadian  
universities

Improved the traceability  
of the Foundation's  
spending

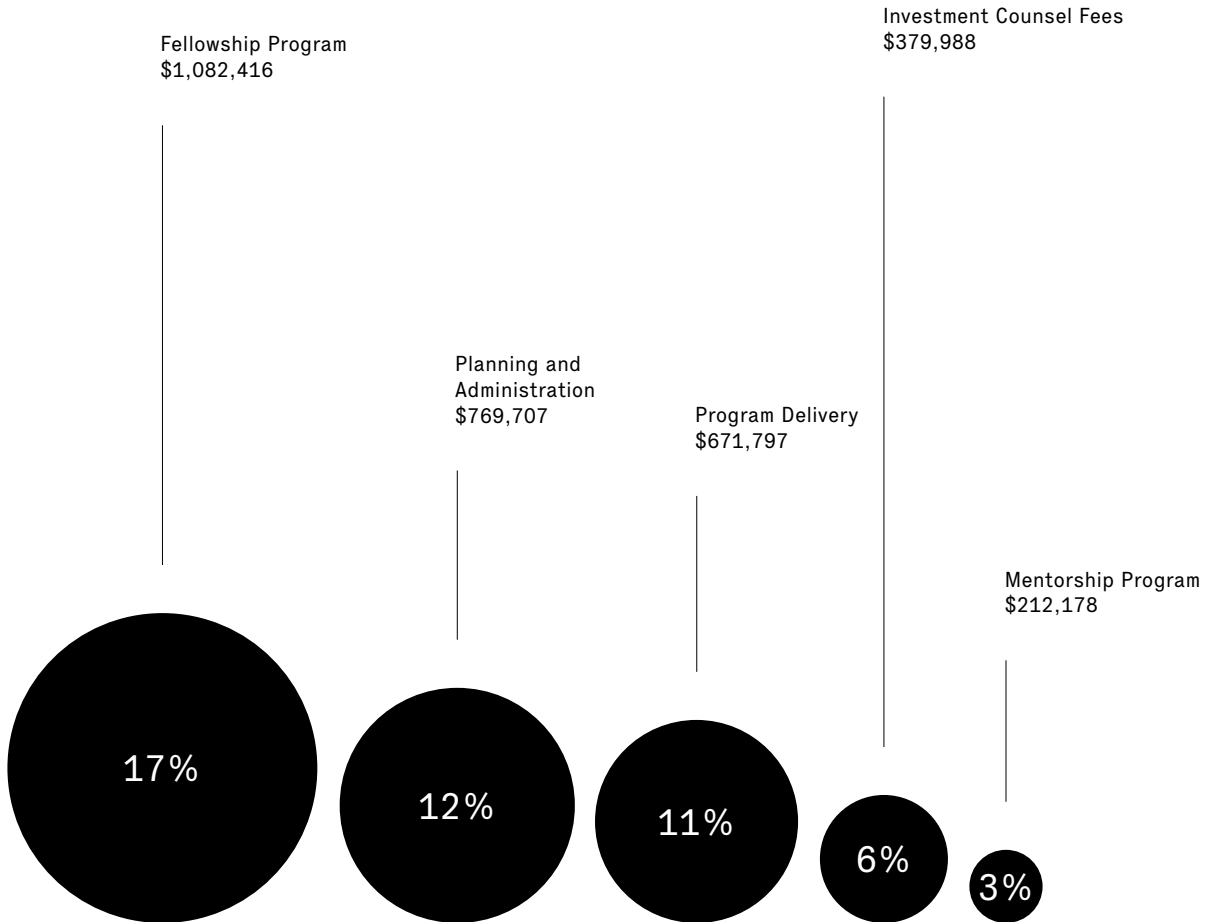
Made adjustments  
to personnel

Scholarship Program  
\$1,795,070

Public Interaction  
Program  
\$1,345,215







Investments as at August 31st (market value)

\$155,609,113

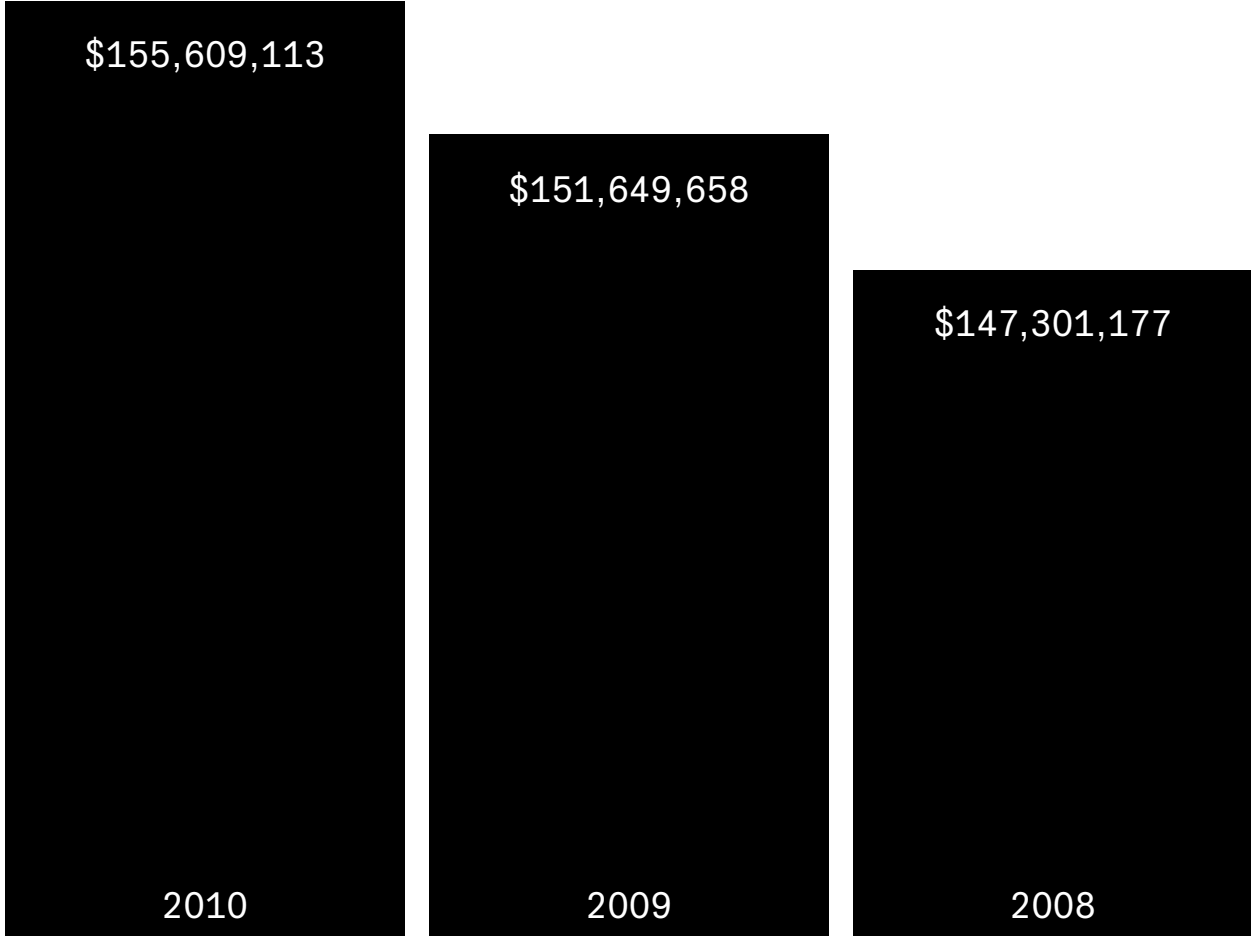
\$151,649,658

\$147,301,177

2010

2009

2008







Looking forward

Looking forward –  
What is coming up in 2010-2015

Marking a new step in its existence, the Foundation has tabled its second strategic plan this year. The new Strategic Plan for 2010-2015 proposes a series of strategic initiatives based on consultation with our stakeholders. Initial steps in the creation of the plan established four guiding principles – our four I's – to inform all new strategic initiatives for the Foundation.

# 1.

## independence

Independence in programs consistent with the highest levels of intellectual enterprise and innovation.

This is notably reflected in the Foundation's governance. This year for instance, the Foundation renewed part of its board, bringing in well-respected leaders from the business world, law, and academia who will act as directors with diligence and rigor, to sustain and reaffirm the autonomy of our essential organization.



## 2.

### integrity

Integrity in operations and governance to assure funders, supporters, and members of the community of the validity of the Foundation's purposes.

This principle achieves its full expression in the rigorous selection processes preceding the naming of Trudeau Scholarships, Fellowships and Mentorships. It is with the invaluable help of independent external review panels that the Foundation is able to attract and select the best candidates.

# 3.

## internationalization

Internationalization of the Foundation programs and activities to help ensure that Canadian innovation in the social sciences and humanities is the equal of the world's best.

This year again, the Foundation invested in international outreach. The organization of events in Paris (on research archives) and New York (on immigration and refugees), and redoubled efforts to reach foreign universities to propose potential Scholars added to the ongoing activities of the Trudeau community members on the international scene.

# 4.

## ideas


A relentless focus on innovative ideas as the ultimate aim of the Foundation's many activities.

Ideas and innovation in literature, social sciences and humanities are at the centre of the Foundation's public purpose and are a leitmotiv to the Trudeau community members. The growing network nurtured by the Foundation embodies the actual purpose of acquiring, transferring, and exchanging knowledge with other researchers, creators, decision makers and the public at large. Our Trudeau Scholars, Fellows and Mentors are lively examples of that aim.





Who we are



An independent and non-partisan Canadian charity, the Pierre Elliott Trudeau Foundation was established in 2001 as a living memorial to the former Prime Minister by his family, friends, and colleagues. In 2002, the Government of Canada endowed the Foundation with a donation of \$125 million following a unanimous vote in the House of Commons. In addition, the Foundation benefits from private sector donations in support of specific initiatives. Through its Scholarship, Fellowship, Mentorship and Public Interaction programs, the Foundation supports outstanding individuals who make meaningful contributions to critical social issues. Our charitable registration number is 895438919RR0001.

## Our mission

Through our growing community, we actively encourage talented individuals to develop audacious proposals, to set and achieve ambitious goals, and to interact with and teach as many people as possible. The best ideas emerge when individuals from different generations and different disciplines focus on a problem together, when technical, scientific and policy innovators are informed by outstanding communicators in bioethics, geography, history and the law, and when new patterns of human behaviour are revealed and deep cultural understanding achieved.

Our distinctive organization is devoted to the delivery of four core programs: three funding programs targeted towards Scholars, Fellows and Mentors, and a Public Interaction Program, intended to achieve knowledge acquisition, transfer, and exchange among our program beneficiaries and the public. The Foundation's annual activity cycle revolves around these four main programs.

## Our themes

Our programs are structured around the following four themes, chosen to reflect the interests of the Late Right Honourable Pierre Elliott Trudeau and areas of critical importance to Canada and Canadians:

- Human Rights & Dignity
- Responsible Citizenship
- Canada in the World
- People and their Natural Environment

# Message from the Chair

Making a difference –  
Moving forward

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Following extensive consultation, the Board adopted a new strategic plan for 2010-2015 confirming that the Foundation's primary purpose is to encourage and create a durable, active and influential network of policy makers, public intellectuals and civically engaged scholars in the social sciences and humanities.



Our collective goal is to serve as a source of important ideas and knowledge transfer on issues that make a difference to Canadian citizens and Canadian public life. Four guiding principles emerge from the strategic plan: (1) Independence of the Foundation and its programs, consistent with the original purpose of our organization, to make a distinct contribution to Canadian society, (2) A relentless focus on innovative ideas as the ultimate aim of the Foundation's many activities, (3) Internationalization of the Foundation programs and activities to help ensure that Canadian innovation in the social sciences and humanities is the equal of the world's best, (4) Integrity in both operations and governance, so that supporters, funders and members of the community may have full assurance of the Foundation's value and validity.

We will be introducing new initiatives which will include new thematic Scholarships with partner universities, annual international and national Visiting Fellowships and a new communication and public engagement strategy. As well, we intend to develop a groundbreaking program of Trudeau Network Projects.

Former Mentors, Fellows and Scholars will be encouraged to form a "Trudeau Foundation Society" to support the projects and the dissemination of innovative ideas.

All of these initiatives will require additional funding, as will the organizational capacity required to support them.

I have every confidence in the Foundation's future, particularly since the President has agreed to continue to lead the organization. Dr. Forest has been instrumental in ensuring the Foundation and its programs achieve relevance, depth and visibility over the last four years. The Board of Directors looks forward to working with him during the exciting next phase of its development. We are also counting on the support of all members of the Trudeau community – past and current Scholars, Fellows and Mentors, Foundation Members and Directors, staff, volunteers and friends. Moving forward together, the Foundation will continue to foster creative thinkers, deliberating crucial issues whose work makes a difference in the lives of us all.

Roy L. Heenan O.C., Ad.E.  
Chairman of the Board  
of Directors



# Message from the President

What really counts

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The Foundation is in better shape than ever. The reputation of our programs is firmly established. We enjoy increasingly widespread recognition, not only in Canada but abroad. Our ever-expanding community now reflects an intellectual horizon as broad and rich as the most beautiful landscapes of our country. I am proud to add that the prudent management of the resources entrusted to us ten years ago has allowed us to maintain excellent financial health. The unfailing dedication of the Foundation staff has done the rest.

Pierre-Gerlier Forest Ph.D., FCAHS  
President

What really counts, at the end of the line, is the network of contacts and viewpoints that the Pierre Elliott Trudeau Foundation has managed to forge, year after year. There is now a very dense and fertile “Trudeau” network comprised of the two hundred and twenty-some people the Foundation has supported since its creation. There is also a wider network, with constantly changing boundaries, made up of all our colleagues, friends, and contributors all around the world.

Among the challenges awaiting us in the years ahead, I cannot think of anything more important than maintaining this dual network and putting it to good use to identify and formulate solutions to the major problems facing our society and our era. The Foundation will continue to gather the most brilliant minds around its programs, but it must also embark on a process to resolutely support the exchange of information, knowledge and points of view.

I am often asked whether there are other organizations like the Pierre Elliott Trudeau Foundation, and I always say no. I humbly believe that we have invented something new. There are others that match curious, engaged young people with experienced practitioners, and still others that seek to narrow the gap between the world of research and the world of policy. But our approach is unique because it seeks to surmount both the barrier of generations and the barrier of practice.

We still have a lot to do, of course. Ideas are our passion, but we especially love to see them come to fruition, in the emergence of new organizations, new opinion trends, or enlightened collective choices. The vocation of the wider Trudeau network is to become a crucible where innovation takes shape. You are cordially invited to join us to meet other seeking spirits examining these essential questions.



# The Trudeau Scholarship

Innovate to shape the future

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Trudeau Scholars are outstanding doctoral candidates, renowned for their creativity, daring multidisciplinary approach and public engagement. Driven by a strong desire to develop innovative ideas and concepts that will have a positive impact on society, they are tomorrow's influencers. The research projects of the following three 2010 Scholars are telling examples of their vision and contribution to society.

Émilie Raymond, doctoral candidate in social work at McGill University, is interested in the citizen participation of older people, a growing topic in today's society. Combining her experience as a researcher and community organizer, she works with a group of disabled seniors to find out whether they really have access to the different decision-making spaces. "We often treat older people as one homogenous group, which is not the case. I am using my research precisely to ensure that all senior citizens, regardless of their physical or economic situation, actively take part in policy making and the public debates promised to them, and that they feel empowered."

Joël Thibert is asking how governments can facilitate the implementation of urban environmental policies in the North American context. In addition to his doctoral research experience in public policy at Princeton University, Joël worked as an urban planning project manager for *Quartier international de Montréal*, an experience that convinced him that the problem faced by Montreal and many other cities is not one of vision but one of governance. "What I am suggesting with my research is to rethink the cities' governance approach, so that urban territory is managed in a way that is not only administrative but based on concrete environmental issues." The results of his work could be used by medium-size cities in Quebec, elsewhere in Canada and around the world.

A lawyer and doctoral candidate in criminology at Simon Fraser University, Michelle Lawrence examines the judicial treatment of individuals found to have committed crimes while in a state of mental disorders induced by drugs and alcohol, where intoxication was voluntary. "Preliminary research suggests a high degree of inconsistency in the application of the law in these cases, as well as potential Charter violations. These cases are expected to rise in number, given the popularity of psychoactive substances, and put added strain on our criminal justice system." Michelle's research, once complete, will offer a new perspective to Canadian law practitioners and public health professionals, and could be applied in many other countries facing similar challenges.

### Ideas for issues of present-day concern

Up to fifteen Scholarships are awarded each year to support doctoral candidates pursuing research into compelling present-day concerns that touch on one or more of the four Foundation themes. The Scholars are highly gifted individuals who are actively and concretely engaged in their fields and expected to become leading national and international figures. Trudeau Scholars are encouraged to work with Trudeau Mentors and Fellows. Interaction with the Trudeau community, non-academic spheres and the general public is an essential aspect of the Scholarship program.

- 197 nominations were examined in the 2010 selection process
- The 2010 call for nominations opened in October 2009 and closed in January 2010
- Canadian and foreign students applied through their universities
- Universities could submit 6 to 8 of their best students to the competition
- Pre-selection and interviews are conducted by external review panels
- 15 Scholars were appointed in 2010
- Scholars were announced by press release on May 13, 2010
- 2010 Scholarships started on September 1, 2010
- The annual value is up to \$60,000 per Scholar (including an annual travel allowance of \$20,000) for up to four years

*“The influence and reputation of Trudeau awards is constantly growing, and it is clear that the experience of a Trudeau Scholarship has a positive effect on the lives and careers of Scholars. In order to increase the number of Scholarships awarded to promising doctoral candidates, the Foundation will create new Scholarships focusing on its four themes, in partnership with universities.”*

- Excerpt from the 2010-2015 Strategic Plan



Karina Bennaiaiah

Geography,  
Arizona State University

Karina is studying how people living in the coastal communities of Central America adapt to environmental and climate change.



François Bourque

Epidemiology,  
King's College London

François is exploring social determinants of mental health in migrant and ethnic minority groups.



Rosalind Raddatz

Political Science,  
University of Ottawa

Rosalind is questioning the social, political and economic viability of the recent peace process in Sierra Leone and Liberia.





Émilie Raymond

Social Work, McGill University

Émilie is seeking to facilitate the empowerment and participation of seniors in public debates and policies.



Adolfo Agundez Rodriguez

Education,  
Université de Sherbrooke

Adolfo is developing tools to introduce children to the ethics of responsible consumption.



Simon Thibault

Communication,  
Université Laval, and  
Sorbonne Nouvelle (Paris 3)

Simon is reviewing international investments in media reform in the war-ridden societies of Kosovo and Bosnia and Herzegovina.



Joël Thibert

Public Policy,  
Princeton University

Joël is asking how we could support the efforts of cities to develop sound environmental policy.



Nathan Bennett

Geography,  
University of Victoria

Nathan is asking whether protecting the marine areas of Thailand can make a positive effect on the employment and livelihood of local communities.



Amanda Clarke

Information, Communication  
and Social Science,  
University of Oxford

Amanda is looking at online citizen political engagement and particularly at how policy decisions in Canada are shaped by the input from e-consultations.



Libe Garcia Zarranz

English and Film studies,  
University of Alberta

Libe is interested in how women writers advance our understanding of individuals and groups living at the margins of Canadian society.



Lisa Kelly

Law, Harvard University

Lisa aims to ensure that Canadian law includes children's and adolescents' rights and interests.



Michelle Lawrence

Criminology,  
Simon Fraser University

Michelle is interested in the judicial treatment of individuals who commit crimes under the influence of mental disorders and substance use.



Scott Naysmith

Social Policy,  
London School of Economics  
and Political Science

Scott is examining how poultry farmers in Indonesia are coping with government interventions to contain avian influenza.



Leila Qashu

Ethnomusicology, Memorial  
University of Newfoundland

Leila is studying how Ethiopian women, while devoid of political power, successfully use musical rituals for conflict resolution.



Erin Tolley

Political Science,  
Queen's University

Erin is studying voter and media attitude toward politicians from visible minorities.

## 2009 Scholars

Martine August, University of Toronto  
 Jonas-Sébastien Beaudry, University of Oxford  
 Magaly Brodeur, Université de Montréal  
 Kathryn Chan, University of Oxford  
 Isabelle Chouinard, Université de Montréal  
 Simon Collard-Wexler, Columbia University  
 Christopher Cox, University of Alberta  
 Tamil Kendall, University of British Columbia  
 Jean-Michel Landry, University of California, Berkeley  
 Laura Madokoro, University of British Columbia  
 Lindsey Richardson, University of Oxford  
 Mark Lawrence Santiago, University of British Columbia  
 Jeremy Schmidt, University of Western Ontario  
 Lisa Szabo, University of Alberta  
 David Theodore, Harvard University

## 2008 Scholars

Maria Banda, University of Oxford & Harvard University  
 Jonathan Beauchamp, Harvard University  
 Andr ee Boisselle, University of Victoria  
 Julia Christensen, McGill University  
 Lisa Freeman, University of Toronto  
 Xavier Gravend-Tirole, Universit  de Montr al & Universit  de Lausanne  
 Shauna Labman, University of British Columbia  
 Mark Mattner, McGill University  
 Daina Mazutis, University of Western Ontario  
 Nicholas Rivers, Simon Fraser University  
 Irvin Studin, York University  
 William Tayeebwa, Concordia University  
 Christopher Tenove, University of British Columbia  
 Alberto Vergara Paniagua, Universit  de Montr al  
 Lilia Yumagulova, University of British Columbia

## 2007 Scholars

Alexander Aylett, University of British Columbia  
Sherri Brown, McMaster University  
Elaine Craig, Dalhousie University  
Lucas Crawford, University of Alberta  
Jessica Dempsey, University of British Columbia  
Sarah Kamal, The London School of Economics and Political Science  
Kristi Kenyon, University of British Columbia  
Joshua Lambier, University of Western Ontario  
Jennifer Langlais, Harvard University  
Myles Leslie, University of Toronto  
Leah Levac, University of New Brunswick  
Jason Morris-Jung, University of California, Berkeley  
Emily Paddon, University of Oxford  
Geneviève Pagé, Université de Montréal  
Kate Parizeau, University of Toronto

## 2006 Scholars

May Chazan, Carleton University  
Dawnis Kennedy, University of Toronto  
Samuel Spiegel, University of Cambridge

### Former Scholars

Caroline Allard, Université de Montréal (2003)  
 Michael Ananny, Stanford University (2006)  
 Anna-Liisa Aunio, McGill University (2003)  
 Catherine Bélar, Université Laval (2006)  
 Jay Batongbacal, Dalhousie University (2003)  
 David R. Boyd, University of British Columbia (2005)  
 Jillian Boyd, University of Toronto (2004)  
 Christine Brabant, University of Sherbrooke (2006)  
 Marie-Joie Brady, University of Ottawa (2005)  
 Ken Caine, University of Alberta (2004)  
 Caroline Caron, Concordia University (2005)  
 Kevin Chan, Harvard University (2005)  
 Astrid Christoffersen-Deb, University of Oxford (2005)  
 Colleen M. Davison, University of Calgary (2004)  
 Nora Doerr-MacEwen, University of Waterloo (2004)  
 Liith Finkler, Dalhousie University (2005)  
 Pascale Fournier, Harvard University (2003)  
 Julie Gagné, Université Laval and École des hautes études en sciences sociales (2003)  
 Margarida Garcia, Université du Québec à Montréal (2004)  
 Ginger Gibson, University of British Columbia (2003)  
 Rajdeep Singh Gill, University of British Columbia (2006)  
 Christian Girard, Université de Montréal (2005)  
 Lisa Helps, University of Toronto (2006)  
 Kate Hennessy, University of British Columbia (2006)  
 Robert Huish, Simon Fraser University (2004)  
 Fiona Kelly, University of British Columbia (2005)  
 Alenia Kysela, University of Toronto (2004)  
 Patti-Ann LaBoucane-Benson, University of Alberta (2004)  
 Alexis Lapointe, Université de Montréal and Paris X Nanterre (2006)  
 D. Memeé Lavell-Harvard, University of Western Ontario (2003)  
 Robert Leckey, University of Toronto (2003)  
 Jason Luckert-Hoff, Université du Québec à Trois-Rivières (2006)  
 David Mendelsohn, McGill University (2004)  
 James Milner, University of Oxford (2003)

Amy Z. Mundorff, Simon Fraser University (2005)  
Prateep Nayak, University of Manitoba (2006)  
Robert Lee Nichols, University of Toronto (2003)  
Alain-Désiré Nimubona, HEC Montréal (2004)  
Taylor Owen, University of Oxford (2006)  
Rebecca Pollock, Trent University (2004)  
Vincent Pouliot, University of Toronto (2005)  
Karen Rideout, University of British Columbia (2004)  
Louis-Joseph Saucier, Université du Québec à Montréal and Paris I Panthéon-Sorbonne (2004)  
Meredith Schwartz, Dalhousie University (2006)  
Ailette Frank Sheinin, University of British Columbia (2005)  
Anna Stanley, University of Guelph (2003)  
Emma J. Stewart, University of Calgary (2005)  
Sonali Thakkar, Columbia University (2005)  
Sophie Thériault, Université Laval (2003)  
Pierre-Hugues Verdier, Harvard University (2006)  
Grégoire Webber, University of Oxford (2004)

# The Trudeau Fellowship

Innovation to drive change

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Trudeau Fellows are highly respected Canadian intellectuals renowned for their vision and their creativity, with the drive and ability to undertake society's most pressing challenges. They contribute to the growth and visibility of an amazing community of creators and researchers involved in an impressive diversity of fields, providing them with opportunities to share their knowledge and experience.



Janine Brodie, 2010 Trudeau Fellow, is a renowned researcher recognized for her academic leadership in the fields of political economy and social governance. Her work focuses on understanding poverty in our society, and particularly on developing and implementing strategies that will bridge the gap between rich and poor at the local and national levels. “The Trudeau Fellowship affords me the resources and time to study this remarkable living laboratory of innovative policy thinking and institutional change. Most specifically, it will enable me to travel to provincial capitals to interview key governmental and non-governmental social policy networks, and bring together researchers and experts to engage in a dialogue on poverty and social policy through national and international conferences.”

Professor Sujit Choudhry, 2010 Trudeau Fellow, is one of Canada’s leading scholars in comparative constitutional law and a sought-after Canadian and international public policy development advisor. As Scholl Chair at the University of Toronto’s Faculty of Law, his research focuses on providing constitutional advice for peaceful resolution in civil war-ridden countries. “Canadian expertise in post-conflict constitution-making is increasingly in demand at the moment, but additional funding is needed for Canada to keep developing this expertise and export it. The Trudeau Fellowship will allow me to build a Centre of Excellence with a unique educational component tailored to the needs of academic experts as well as practitioners, positioning Canada as a leader in this field.”

### From ideas to public policy

Up to five Fellows are chosen each year in recognition of outstanding achievement, innovative approaches to issues of public policy, and commitment to public engagement. The Foundation provides support that allows the Fellows to make extraordinary contributions in their fields through leading-edge research and creative work. As the Fellowship program grows, the Fellows build a network of imaginative people working together from a variety of perspectives to address fundamental social and policy issues.

- The 2010 call for nominations for the four regular Trudeau Fellowships opened in September and closed in November 2009
- The 2010 call for nominations for the first national Visiting Trudeau Fellowship opened in October and closed in December 2009
- Nominations were submitted by a list of more than 300 eminent nominators, in Canada and abroad, including all Canadian University Presidents
- Nominations for 63 Canadian candidates were examined in the Trudeau Fellowships selection process
- 9 nominations were examined in the inaugural national Visiting Trudeau Fellowship selection process
- The Fellows were selected by an external committee of peers
- 4 Fellows were appointed in 2010
- The four Fellows were announced at a formal announcement reception in Toronto on September 28, 2010 and through a press release
- Their mandate began in June 2010 and will end in May 2013
- Overall value per Fellow: \$225,000 over three years

*“The Fellows’ reputation and leadership are unquestionable assets for the Trudeau community. In that regard, the Foundation plans to award an additional Fellowship, ensuring that national and international Visiting Fellowships get awarded annually. In addition to the diversity of the awards, the Fellows’ responsibilities toward the Trudeau programs will increase. Their role will involve a more practical aspect in order to facilitate the implementation of Trudeau Networks Projects.”*

- Excerpt from the 2010-2015 Strategic Plan



Janine Brodie

Professor, Department of Political  
Science, University of Alberta

Professor Brodie's career is dedicated to the understanding of poverty in our society. Through her work, she endeavours to identify tools that will effectively reduce poverty and social inequalities at both local and national levels.



Sujit Choudhry

Professor, Faculty of Law,  
University of Toronto

A highly respected Canadian scholar specializing in constitutional law, Choudhry strives to provide counsel for peaceful resolution in civil war-ridden societies.



Alain-G. Gagnon

Professor, Department of  
Political Science, Université  
du Québec à Montréal

Gagnon works to bring justice and stability to the management of national and cultural diversity within federal systems, including Canada's.



Steven Loft

Artist and curator,  
Visiting Trudeau Fellow,  
Ryerson University

A well-known figure of contemporary art in Canada, Mr. Loft will be a Visiting Trudeau Fellow at the Ryerson Gallery and Research Centre. Mr. Loft's work addresses issues of cultural identity, human rights, and communication, and provides new perspectives on Indigenous art and cultural discourse.

## 2009 Fellows

Isabella C. Bakker, York University  
 Claire Bradford (Deakin University, Australia), Visiting at University of Winnipeg  
 Beverley Diamond, Memorial University of Newfoundland  
 Simon Harel, Université du Québec à Montréal  
 Jeremy Webber, University of Victoria

## 2008 Fellows

François Crépeau, McGill University  
 Kathleen Mahoney, University of Calgary  
 John Robinson, University of British Columbia  
 Rosemary Sullivan, University of Toronto  
 Guy Vanderhaeghe, University of Saskatchewan / St. Thomas More College

## 2007 Fellows

William D. Coleman, University of Waterloo  
 Eric Helleiner, University of Waterloo  
 Shana Poplack, University of Ottawa  
 William E. Rees, University of British Columbia  
 Joseph Yvon Thériault, Université du Québec à Montréal

## 2006 Fellows

Constance Backhouse, University of Ottawa  
 John Borrows, University of Victoria  
 Jocelyn Létourneau, Université Laval  
 Barbara Neis, Memorial University of Newfoundland  
 Jennifer Welsh, University of Oxford

## 2005 Fellows

George Elliott Clarke, University of Toronto  
 Jane Jenson, Université de Montréal  
 Will Kymlicka, Queen's University  
 Margaret Lock, McGill University  
 Philippe Poullaouec-Gonidec, Université de Montréal

#### 2004 Fellows

Ann Dale, Royal Roads University  
Roderick A. Macdonald, McGill University  
Rohinton Mistry, writer  
Donald Savoie, Université de Moncton  
Daniel Weinstock, Université de Montréal

#### 2003 Fellows

David Ley, University of British Columbia  
Danielle Juteau, Université de Montréal  
Janice Gross Stein, University of Toronto  
James Hamilton Tully, University of Victoria

# The Trudeau Mentorship



The Mentorship program is unique to the Foundation. Acclaimed authors, journalists, politicians, community organizers, and business men and women join the Trudeau community on the basis of their remarkable achievements and their commitment and willingness to share their knowledge and experience with young people starting out in their careers. Here, 2010 Trudeau Mentors Maria Campbell and Guy Berthiaume offer a glimpse into the way Trudeau Mentors provide professional context and a reality check for the research efforts of Trudeau Scholars.

Maria Campbell is a pioneer Métis writer, playwright, documentary filmmaker and teacher. For the past 40 years, she has advocated for Aboriginal rights and volunteered with women and children in crisis. She mentors Julia Christensen, a Ph.D. student in Geography at McGill University and 2008 Trudeau Scholar. “Julia and I are both writers and I knew our pairing would lead to a lot of inquiries. Julia’s work addressing homelessness in northern communities resonates with me personally, but I find it to be essential because the results of her research will have an impact on real people. Born and raised in the Northwest Territories, Julia is very familiar with the challenges faced by the northern people and places. What I hope to bring as a Mentor is a community work perspective, and most importantly, an Aboriginal perspective, to ensure that the cultural component is taken into account. I also plan to support her in making her research more accessible using popular writing, visual media, workshops and seminars.”

After two decades in leadership positions in research and higher education institutions, Guy Berthiaume is now Chair and CEO of the Quebec National Library and Archives. Dr. Berthiaume’s network encompasses the fields of public administration and international relations. “I thought my pairing with Xavier Gravend-Tirole, Ph.D. student in Theology and Science of Religion at Université de Montréal and Université de Lausanne, and 2008 Trudeau Scholar, was very clever. Although there are no obvious links between our respective fields of activity, I quickly sensed Xavier’s strong interest in the media. As a mentor, my role will be to help Xavier understand the relevance of his work in relation to other fields, most particularly the media, and provide him with the right platforms and contacts to communicate his knowledge effectively. This openness and desire to see intellectuals take part in public debates will come to life in a conference that we are currently developing on the importance of religion and the media, which will take place in the fall of 2011.”

## Relationships for innovation

Up to twelve Mentors are appointed each year. The Mentorship program is an innovative experiment that seeks to forge intellectual and personal bonds between renowned Canadians with extensive experience in public life and talented doctoral students. Mentors are drawn from an impressive array of professional backgrounds, including the arts, journalism, business, public service, the legal profession, research and advocacy. They enjoy a nationwide and international reputation based on achievements in their own particular field, and, most importantly, are able to introduce Trudeau Scholars to their networks.

- The 2010 call for nominations opened in July and closed in September 2009
- Nominations were submitted by a list of over 300 eminent nominators
- 192 nominations were examined in the selection process of 2010 Mentors
- The Mentors are selected by an external committee of peers
- 10 Mentors were appointed in 2010
- The Mentors were announced in a press release on February 1, 2010
- Their mandate began in January 2010 and will end in June 2011
- Each Mentor may receive a \$20,000 honorarium and a \$15,000 travel allowance

*“The Foundation plans to increase the length of the Mentorship assignment from 18 to 24 months. With this extension, it is hoped that Scholars will have more time to benefit from their relationship with their Mentor, and that Mentors will take part more actively in Trudeau events and develop their role, more specifically with regards to the development of new Trudeau Network Projects.”*

- Excerpt from the 2010-2015 Strategic Plan



Guy Berthiaume  
Quebec

Currently Chair and CEO of the Quebec National Library and Archives after two decades at the apex of institutions of research and higher education in Quebec and France. His networks span research, public administration and international relations.



Donald W. Campbell  
British Columbia

Former Group President, CAE inc., Canadian Ambassador to Japan, and Deputy Minister, Foreign Affairs and International Trade, he wields extensive knowledge of international relations and business with Asia, in particular with Japan.



Maria Campbell  
Saskatchewan

A pioneer Métis writer, broadcaster, playwright and filmmaker, she advocates for Aboriginal rights and has volunteered with women and children in crisis for over 40 years. She is a unique incarnation of perseverance, resilience and hope.



Edward Broadbent  
Ontario

Former Professor, Member of Parliament and leader of the NDP, and founding President of Rights and Democracy, he is an expert in the theory and practice of policy-making, socially engaged and eager to share his knowledge with young minds.



Roberta Jamieson  
Ontario

The first woman from a First Nation in Canada to graduate from law school, former Ombudsman of Ontario and former Chief of the Six Nations of the Grand River, leader in race relations and conflict resolution, she is now President and CEO of the National Aboriginal Achievement Foundation.



Jim Judd  
Ontario

As a seasoned, high-ranking public servant assigned to critical positions in Canada and abroad (Caracas, Washington), he handled various strategic issues such as national security, international trade, finance, and the oil industry. He is the former Executive Director of the Canadian Security Information Services.



Pierre Pettigrew  
Quebec

An expert in international business, former politician and Federal Minister (Foreign Affairs, International Trade), he has led a distinguished career with success in both the public and private sectors, especially in matters of international economics and trade.



Edward Roberts  
Newfoundland and Labrador

Actively involved in public and political issues for 50 years, he is a flagship figure in Newfoundland and Labrador, where he served as Lieutenant-Governor. His experience and interest in history and law make him an invaluable source of wisdom.



Guy Saint-Pierre  
Quebec

Former CEO of SNC-Lavalin and former Quebec Minister of Education and Industry and Trade. His career bridges the business sector and the policy world, and his networks include many influential institutions.



Jodi White  
Ontario

Former President of the Public Policy Forum, her leadership experience extends to journalism, politics, government, business and international affairs. She is active on the boards of a range of institutions and organizations involved in academics, arts, health and culture.

### 2009 Mentors

James Bartleman  
Chuck Blyth  
Renée Dupuis  
Ivan Fellegi  
Peter Harder  
Misel Joe  
Carolyn McAskie  
Anne McLellan  
Alanis Obomsawin  
Nola-Kate Seymoar

### 2008 Mentors

Dyane Adam  
Robert Fowler  
Sylvia D. Hamilton  
Janice MacKinnon  
Louise Mailhot  
Larry Murray  
Alex Neve  
Monica Patten  
Raymond A. Speaker

### 2007 Mentors

Lloyd Axworthy  
Ken Battle  
Monique Bégin  
Elizabeth Davis  
Ursula Franklin  
Huguette Labelle  
Gordon Smith

### 2006 Mentors

Margaret Catley-Carlson  
Raymond Chrétien  
Arthur Hanson  
Frank Iacobucci  
Donald Johnston  
Gregory P. Marchildon  
David Morley  
Stephanie Nolen  
Sheila Watt-Cloutier



2005 Mentors

Paul Heinbecker  
Irshad Manji  
Judith Maxwell  
Elizabeth May  
Morris Rosenberg  
Roméo Saganash  
Jeffrey Simpson  
Ken Wiwa

2004 Mentors

Louise Arbour  
Allan Blakeney  
Elizabeth Dowdeswell  
Yves Fortier  
Michael Harcourt  
Judith Maxwell  
Ken Wiwa

# The Public Interaction Program

A community of innovation

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Over the last year, the Foundation's Public Interaction Program reached another level thanks to the quality of its speakers, innovative ideas and formats, and the development of new international networks.

Of course, the sixth annual conference on public policy on Canadian Cities and the Public Sphere, held in Ottawa in November 2009, comes to mind. This major PIP event provided opportunities to explore innovative ideas such as integrating art in 21st century urban planning practices, a concept presented by Cynthia Ghorra-Gobin, Research Director at the CNRS. The annual conference also caught the attention of *Tree Hugger*, one of the main Web 2.0 influencers in environmental and sustainable development, who covered the event in real time through its different channels.

The Trudeau Lectures, for instance the ones by Rosemary Sullivan and Guy Vanderhaeghe, and the seminars held in Paris and New York are events that highlight the importance of the PIP in gathering the most creative minds and transferring knowledge and ideas. Discussing the influence of biographies and historical novels on our recollection of past events and our ability to transfer it to the current context, writers Sullivan and Vanderhaeghe demonstrated how the creative process triggers our understanding of a specific context and creates the distance necessary for the advancement of our public policies and institutions.

The Paris and New York seminars provided opportunities for the Foundation to foster new international partnerships. The New York event was particularly important in that regard, enabling the Foundation to access the prestigious circle of United Nations organizations and to distinguish itself through short presentations and in-depth discussions, a dynamic approach welcomed by all participants.

## Ideas shared with a network

The Public Interaction Program (PIP) is the centrepiece that brings the three grant-giving programs together. The PIP events and the travel and research allowance provide unique opportunities to learn and exchange research, ideas and proposals that focus on specific questions, and to share relevant knowledge with colleagues from different disciplines and varied life and cultural backgrounds. The structure of our programs allows leading-edge researchers and Fellows, upcoming Ph.D. Scholars and practical-minded Mentors to bring their expertise together to make the exchange and transfer of knowledge a reality. The PIP comes to life through four major annual Trudeau events. In addition, members of the Trudeau community are encouraged to organize PIP events on major public policy issues that affect Canadians and global society. Finally, we collaborate with other institutions and organizations to advance discussions in wider fields.

- Purpose: knowledge acquisition, knowledge transfer, and knowledge exchange
- Number of events organized in 2009-2010: 14
- Total attendance at events this year: 1,075

*“The Foundation will develop a communications strategy to support new activities organized as part of the Public Interaction Program – a strategy built on two axes that will position the Annual Conference on Public Policy as an important event in the intellectual and public Canadian landscape, as well as promote the quality experience offered by the Foundation and its four themes. These strategic efforts will provide opportunities for the PIP to strengthen and diversify its events, and enable the Trudeau community to be perceived as an incubator of crucial ideas.”*

- Excerpt from the 2010-2015 Strategic Plan





*“Dealing with Migrations as a Test for Our Democracies”*

Trudeau Lecture by Professor François Crépeau  
(McGill University), 2008 Trudeau Fellow  
October 20, 2009 — Winnipeg, Manitoba

The University of Winnipeg was the ideal venue to start our second series of Trudeau Lectures. 2008 Trudeau Fellow and McGill Professor François Crépeau spoke of migrants’ rights to a crowd of more than 70 participants, including University President Lloyd Axworthy – a former Trudeau Mentor – and representatives of the Canadian Museum for Human Rights. He stated that our complex societies are made stronger through immigration: our cultures and collective narratives are deeply influenced by it, though they do not necessarily recognize this. He claimed that, as a constant of civilization, mobility should become a right. The content of this lecture is published in the second volume of the *Trudeau Foundation Papers*.



*“Canadian Cities and the Public Sphere:  
Rethinking the Urban Commons”*

Annual Trudeau Conference on Public Policy  
November 19-21, 2009 — Ottawa, Ontario

With more than 250 registered participants – 65% of them from outside the Trudeau community – the Conference on Canadian Cities in Ottawa was the Foundation’s most widely attended event to date. Delegates appreciated the mix of keynote addresses, panel sessions, and respectful dialogue that took place on a variety of complex topics related to the city and urban societies. A number of participants reported that the event changed their perspective on the issue.

The opinion poll on life in the cities drew attention from many online and print news outlets in the country, such as *The Toronto Star*, *The Ottawa Citizen*, *The Gazette*, and other CanWest outlets. Trudeau Fellow John Robinson, a keynote speaker at the event, was also profiled in the *Financial Post*’s “Smart Shift” series.



### *Trudeau Mentors-Scholars Retreat*

January 26-28, 2010 — Orford, Quebec

With an opening lecture by James Mitchell (Sussex Circle) and a closing lecture by André Pratte (*La Presse*), the Retreat provided over 60 participants, including 15 Mentors, with invaluable opportunities to discuss the link between research, ideas and public policies. The newly appointed 2010 Mentors in attendance clearly enjoyed meeting with their Scholars and reconnecting with old friends and former colleagues among the Mentors. The Mentors were formally announced on February 1 on the Foundation website, by email to its network, and by press release.



### *“Confessions of a Biographer: Is Fact Stranger than Fiction?”*

Trudeau Lecture by Professor Rosemary Sullivan  
(University of Toronto), 2008 Trudeau Fellow  
January 27, 2010 — Sherbrooke, Quebec

The Foundation combined the Retreat with one of the Trudeau Lectures. In this case, 2008 Trudeau Fellow, University of Toronto professor and writer Rosemary Sullivan shared her writing experience about some of the most outstanding writers and artists of the 20th century. Her presentation proved that fact can indeed sometimes be stranger than fiction. Her lecture at Sherbrooke University culminated with a film summarizing her latest book, *Villa Air-Bel*, and exploring efforts made to help artists persecuted by the Nazi Regime to flee France to safety. The lecture is available as part of the second volume of the *Trudeau Foundation Papers*.





*“Apprehending the Past: History versus the Historical Novel”*

Trudeau Lecture by Canadian author Guy Vanderhaeghe (University of Saskatchewan), 2008 Trudeau Fellow February 16, 2010 — Fredericton, New Brunswick

The third Trudeau Lecture of this series, held at the University of New Brunswick in Fredericton, was a resounding success. Writer and Trudeau Fellow Guy Vanderhaeghe’s presentation on “Apprehending the Past: History versus the Historical Novel” brought together an audience of more than 130 participants who filled the auditorium of the University’s Wu Centre. Guy Vanderhaeghe was warmly welcomed by the University, which also organized a luncheon with 30 graduate students and faculty members, and a lunch in his honour with University President Dr. Eddie Campbell. A written version of this lecture appears in the second volume of the *Trudeau Foundation Papers*.



*“On Beyond Zebra: Being Undisciplined in Support of Sustainability”*

Trudeau Lecture by Professor John B. Robinson (University of British Columbia), 2008 Trudeau Fellow March 3, 2010 — Toronto, Ontario

The fourth Trudeau Lecture of this series was held at Ryerson University, in downtown Toronto. More than 80 people listened to Trudeau Fellow John Robinson outline his suggestion of being undisciplined in support of sustainability. Ryerson President Dr. Sheldon Levy welcomed the public, and Trudeau Mentor Ursula Franklin introduced the speaker. John Robinson also enlightened a group of some 20 students and staff during a luncheon discussion earlier the same day, describing the advances Ryerson could make to increase public awareness and interest in this matter. The geography department organized a dinner in honour of the speaker, attended by a dozen faculty members and university officials. The content of this lecture is included in the second volume of the *Trudeau Foundation Papers*.



*“Creativity and Public Policy”*

Trudeau Summer Institute  
May 17-21, 2010 — Saskatoon, Saskatchewan

Over 115 registered participants discovered Saskatoon during the four days of the Trudeau Summer Institute. The mix of seminars, discussions of position papers, and roundtables on “Creativity and Public Policies” was complemented by cultural trips to Batoche National Heritage Site and Wanuskewin Park. Playwright René-Daniel Dubois delivered an inspiring speech at a festive dinner held at the Mendel Art Gallery. Guest speakers such as Roy Romanow, Steven Lewis, Shari Graydon, John English, Daniel Poliquin, and Duncan Cameron also enlightened the participants with their thoughts. A number of collaboration projects were discussed by Trudeau Fellows, Scholars and Mentors.



*“What is Justice?”*

Trudeau Lecture by Professor Kathleen Mahoney  
(University of Calgary), 2008 Trudeau Fellow  
June 3, 2010 — Montreal, Quebec

Trudeau Fellow Kathleen Mahoney’s Trudeau Lecture at Concordia University on the theme of “What is Justice?” was webcasted live on June 3, and the podcast is available on our website. The lecture, which was the last in the 2009-2010 series, is part of the second volume of the *Trudeau Foundation Papers*. The event attracted close to 100 participants and was part of the 2010 Congress of the Canadian Federation for the Humanities and Social Sciences.







*“Social Sciences and Humanities in Motion: The Pierre Elliott Trudeau Foundation Audiovisual Archives”*

September 22-24, 2009 — Paris, France

More than 40 participants attended the first seminar on the Foundation’s audiovisual archives, organized with the ESCoM-Fondation Maison des Sciences de l’Homme (FMSH) in Paris. About 20 Trudeau community members came together to learn about the FMSH Audiovisual Research Archives and discuss the benefits and challenges of creating a website that actively encourages knowledge transfer and exchange between members of the humanities and social sciences community. The outcome of the discussion will inform the current redesign of the Foundation’s website.



*“Citizenship in the City? Exploring the Type of Problem a City Is”*

November 18-19, 2009 — Ottawa, Ontario

A seminar organized by Trudeau Scholars Lisa Freeman (2008) and Kate Parizeau (2007) and supported by the Foundation, which attracted close to 50 participants.



*“Research as Dialogue with Communities”*

November 19, 2009 — Ottawa, Ontario

Scholars’ Workshop organized by 2007 Scholar Kristi Kenyon with 20 participants.

*“Writing Beyond the Ivory Tower”*

January 28, 2010 — Orford, Quebec

A writing workshop organized by three Trudeau Scholars, Chris Tenove (2008), Julia Christensen (2008) and Alex Aylett (2007), drawing the interest of more than 20 Scholars and Mentors.



*“Refugees and the Regional Dynamics of Peacebuilding”*

May 3-4, 2010 — New York City, USA

More than 35 people – experts and practitioners alike – participated in our first event in the United States, on May 3-4. The Foundation secured prestigious partnerships for the occasion, with the International Peace Institute, the Peacebuilding Support Office of the United Nations and the UNHCR. The seminar attracted high-ranking UN officials and country representatives to a discussion on refugees and the regional dynamics of peacebuilding. The Vice-Chairman of the Peacebuilding Commission, Czech Ambassador Dr. Martin Palouš, gave the opening address. The intellectual contribution of the Trudeau community was also stellar, with more than 15 past and current Mentors, Fellows and Scholars participating in an intense exchange of ideas. 2009 Trudeau Mentor Carolyn McAskie and 2003 Trudeau Scholar James Milner (Carleton University) were actively involved in the preparations for the event

*“Ideas for Change: Creativity in Managing Socio-Ecological Systems”*

May 21, 2010 — Saskatoon, Saskatchewan

Scholars’ Workshop organized by Trudeau Scholars Lilia Yumagulova (2008), Nicholas Rivers (2008), and Jeremy Schmidt (2009) (25 participants).

# The Trudeau Foundation Society

## Sustaining innovation

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Over the last decade, the Trudeau Foundation has established a remarkable pool of intellectuals, decision-makers and creators committed to research in the social sciences and humanities – Scholars, Fellows and Mentors whose dedication and desire to communicate their ideas power the growing momentum of the Trudeau community and drive its reach and reputation. The Trudeau network is growing strong and has the potential to become an influential source of innovative ideas.



It is to this end that the Trudeau Foundation Society was created, bringing together former Trudeau awardees who play an active role in public and academic sectors. The Society's mandate is to foster productive and long-term relationships among all Trudeau community members.

The Trudeau Foundation Society is starting to take shape. In 2010, an executive committee formed by Renée Dupuis (2009 Mentor), Barbara Neis (2006 Fellow), Taylor Owen (2006 Scholar) and Grégoire Webber (2004 Scholar) was created, an important first step in the Society's capacity to develop and plan its activities.

The initiatives developed so far include pairing former awardees with incoming Scholars, theme-oriented activities, content production and dissemination projects. These events will complement those of the Public Interaction Program and enable the Trudeau community to play an increasing role in Canadian public life.

# Governance

The goal of governance at the Pierre Elliott Trudeau Foundation is to ensure that the Foundation complies with its legal and regulatory requirements and that the Foundation is working to achieve its charitable purpose. The primary custodians of governance at the Foundation are the directors and members of the corporation.

## Board of Directors

The Foundation is governed by a distinguished, independent pan-Canadian Board of Directors. Board members serve for renewable terms of two years. This year, the Board met on two occasions: in November 2009 and April 2010. As part of their fiduciary obligations, the Board and its committees – Executive Committee, Audit Committee, Finance and Investment Committee, Application and Nomination Review Committee, Governance Committee – have supported the Foundation President in strategic decision-making and ensured that competent leadership is in place, that Financial and legal responsibilities are carried out effectively, that assets are protected, and that risks are identified and managed appropriately.

- Roy L. Heenan,\* Board Chair, Chairman and Founding Partner, Heenan Blaikie LLP
- Michel Bastarache, Counsel, Heenan Blaikie LLP, former Justice of the Supreme Court of Canada
- William G. Davis, Counsel, Davis Webb LLP
- Paul Desmarais Jr., Chairman and Co-Chief Executive Officer, Power Corporation of Canada
- Alexander Himelfarb, Director, Glendon School of Public & International Affairs, York University
- Chaviva Hošek,\* President and Chief Executive Officer, Canadian Institute for Advanced Research
- Robert Lacroix, Fellow of the CIRANO, Professor, and former Rector, Université de Montréal
- Marc Lalonde, Counsel, International Commercial Arbitration
- Paule Leduc, Corporate Director, former Rector, Université du Québec à Montréal
- L. Jacques Ménard, Chairman, BMO Nesbitt Burns and President, BMO Financial Group, Quebec
- Heather Munroe-Blum, Principal and Vice-Chancellor and Senior Officer of McGill University
- Patrick Pichette, Senior Vice-President and Chief Financial Officer, Google Inc.
- Marc Renaud, Invited Chair, Instituto Universitário de Lisboa, Portugal
- Sean E. Riley, President, St. Francis Xavier University
- Emőke J. E. Szathmáry, President Emeritus, University of Manitoba
- Alexandre Trudeau,\* Documentary filmmaker
- Milton K. Wong, Chairman, Perceptronix Medical Inc.

\* Member of the Executive Committee

## Members of the Corporation

The Members of the Pierre Elliott Trudeau Foundation, a remarkable group of Canadians from many walks of life, provide general oversight for the Foundation. The advice they share with the Directors and the Foundation staff is invaluable. They met in November 2009 at the Annual Meeting of the Members where they appointed external auditors and new directors and members as required.

- Patricia E. Bovey, Winnipeg, Manitoba
- Dennis M. Browne, St John's, Newfoundland and Labrador
- James A. Coutts, Toronto, Ontario
- William G. Davis, Toronto, Ontario
- John English, Kitchener, Ontario
- Eileen E. Gillese, Toronto, Ontario
- Ron Graham, Toronto, Ontario
- Roy L. Heenan, Montreal, Quebec (Chair)
- Louise Houle, Montreal, Quebec (Secretary)
- Edward Johnson, Montreal, Quebec
- Marc Lalonde, Montreal, Quebec
- Joseph MacInnis, Toronto, Ontario
- Bruce McNiven, Montreal, Quebec (Treasurer)
- Robert W. Murdoch, Salt Spring Island, British Columbia
- P. Michael Pitfield, Montreal, Quebec
- Roy J. Romanow, Saskatoon, Saskatchewan
- Peter Sahlas, Paris, France
- Alexandre Trudeau, Montreal, Quebec
- Justin Trudeau, Montreal, Quebec



# Friends of the Foundation

Foundation activities rely on the dedication of many friends and collaborators who often volunteer their time, donate financial resources, and participate in our various activities throughout the year. It is the case of the individuals who serve as members of our external groups of advisory assessors and provide the prestige and rigour of the selection process for Trudeau Scholars, Fellows and Mentors. Foundation events also benefit from the support and advice of different partners. These men and women play a crucial role in the development of the Trudeau community, and the Foundation is thankful for their enthusiasm, time and support.

#### Donors

- Bank of Montreal
- The Honourable A. Anne McLellan
- The Estate of Vincent Borg
- University of Ottawa
- Dr. Lesley Cormack
- Prof. Barbara Neis
- Nelson Education Ltd.
- Ms. Caroline Caron
- Emond Montgomery Publications Ltd.
- Mr. David Stansen
- and other anonymous donors

#### File Review Committees

- Ms. Michèle Boisvert, Montreal, Quebec
- Ms. Chantal Blouin, Ottawa, Ontario
- Ms. Jillian Boyd, Ottawa, Ontario
- Prof. Douglas Brown, Antigonish, Nova Scotia
- Dr. Duncan Cameron, Quebec City, Quebec  
(Chair of the Fellows review panel)
- Dr. Robert Campbell, Sackville, New Brunswick
- Prof. George Elliott Clarke, Toronto, Ontario
- Mr. Jack Davis, Bragg Creek, Alberta
- Prof. André Émond, Sudbury, Ontario
- Dr. Sherrill Grace, Vancouver, British Columbia
- Mr. Ian Green, Ottawa, Ontario
- Ms. Agnès Gruda, Montreal, Quebec
- Prof. Simon Harel, Montreal, Quebec  
(Chair of the Scholars review panel)
- Mr. Bob Hepburn, Toronto, Ontario
- Mr. John Knubley, Ottawa, Ontario
- Prof. Naomi Krogman, Edmonton, Alberta  
(Vice-chair of the Scholars review panel)
- Prof. Janice MacKinnon, Saskatoon, Saskatchewan
- Prof. Susan Marlin, Kingston, Ontario
- Mr. Andrew Noseworthy, St. John's, Newfoundland  
and Labrador (Chair of the Mentors review panel)
- Prof. Dominique Payette, Quebec City, Quebec

# Staff

The Foundation is managed efficiently and transparently, and both management and staff strive to align with best practices in the sector. The Foundation's organizational structure is lean and flexible, focused on the delivery of its four core programs, and the production cycle is intensive. During the 2009-2010 fiscal year, the Foundation had one part-time and seven full-time staff members; specific functions, especially in the areas of accounting, communications and information services, continue to be contracted out.



The Foundation staff suggests strategic directions to the Board, administers the day-to-day operations of the Foundation, serves program beneficiaries, works to build up the Trudeau community, and promotes the work of the Foundation within the academic community and the wider public.

- Emilie Carrier, Executive Assistant (leave replacement)
- Bettina B. Cenerelli, Program Director — Fellowships, Mentorships and Public Interaction
- Catalina Pintos Chew, Administrative Assistant (as of May 2010)
- Élise Comtois, Director of Corporate Services and Public Affairs
- Norah Cyprien, Administrative Assistant (until December 2009)
- Pierre-Gerlier Forest, President
- Stéphanie Forest, Executive Assistant (on leave as of June 2010)
- Catherine Masson, Communications Officer (as of September 2010)
- Elizabeth Rivera, Program Assistant (as of March 2010)
- Josée St-Martin, Program Director — Scholarships
- François-Xavier Tremblay, Communications Officer (until July 2010)
- Karine Vézina, Administrative Assistant (from February 2010 to September 2010)

#### Additional Team Members

- Jessica Roberts, Intern, Program Support (summer 2010)
- Mihai Siserman, Intern, Balanced Scorecard Project (summer 2010)

# Plans for 2010-2011

- We intend to appoint up to fifteen Scholars, five Fellows and twelve Mentors.
- We will organize and hold eight Trudeau events and support at least two additional public interaction events.
- We will start implementing the new strategic plan initiatives, including:
  - Working towards establishing partnerships with Canadian universities to expand the Scholarship program through the implementation of Thematic Scholarships
  - Designing and implementing a five-year development plan to support current and future initiatives with additional funding and the organizational capacity needed to support them







# Financial Statements

1 Chartered accountant auditor  
permit No. 15492

"PricewaterhouseCoopers"  
refers to  
PricewaterhouseCoopers  
LLP/s.r.l./s.e.n.c.r.l., an Ontario  
limited liability partnership, or,  
as the context requires, the

PricewaterhouseCoopers  
global network or other  
member firms of the network,  
each of which is a separate  
legal entity.

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

We have audited the statement of financial position of La Fondation Pierre Elliott  
Trudeau/The Pierre Elliott Trudeau Foundation (the “Foundation”) as at  
August 31, 2010 and the statements of revenues and expenses, changes in  
net assets and cash flows for the year then ended. These financial statements  
are the responsibility of the Foundation’s management. 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 plan and perform an audit to obtain  
reasonable assurance whether the financial statements are free of material  
misstatement. An audit includes examining, on a test basis, evidence supporting the  
amounts and disclosures in the financial statements. An audit also includes assessing  
the accounting principles used and significant estimates made by management, as  
well as evaluating the overall financial statement presentation.

In our opinion, these financial statements present fairly, in all material respects, the  
financial position of the Foundation as at August 31, 2010 and the results of its  
operations and its cash flows for the year then ended in accordance with Canadian  
generally accepted accounting principles.

*PricewaterhouseCoopers LLP*<sup>1</sup>

Chartered Accountants  
Montréal, Québec  
November 4, 2010

As at August 31, 2010

2010

2009

	\$	\$
<b>Assets</b>		
Current assets		
Cash and cash equivalents	406,342	373,116
Short-term investments (note 5)	1,738,502	788,062
Marketable securities (note 6)	1,452,740	3,162,407
Interest receivable	1,634,735	1,683,313
Other receivables	103,917	97,403
	<u>5,336,236</u>	<u>6,104,301</u>
Marketable securities (note 6)	150,311,706	145,368,408
Property and equipment (notes 2 and 7)	124,996	156,403
Intangible assets (notes 2 and 8)	13,016	15,224
Deferred website development costs		
— (accumulated amortization of \$183,831; 2009 – \$174,074)	16,852	5,322
	<u>155,802,806</u>	<u>151,649,658</u>

## Statement of Financial Position



\$

\$

**Liabilities**

## Current liabilities

Accounts payable and accrued liabilities	307,634	456,822
Current portion of fellowship prizes payable (note 9(a))	890,022	597,514
Current portion of scholarships payable (note 9(b))	1,686,890	1,337,398
Mentorships payable	100,000	100,000
	<u>2,984,546</u>	<u>2,491,734</u>

## Long-term liabilities

Fellowship prizes payable (note 9(a))	300,886	402,105
Scholarships payable (note 9(b))	1,881,470	2,011,263
	<u>2,182,356</u>	<u>2,413,368</u>
	<u>5,166,902</u>	<u>4,905,102</u>

## Net Assets

Net assets restricted for endowment purposes (note 10)	125,000,000	125,000,000
Net assets invested in property and equipment and intangible assets	138,012	171,627
Internally restricted net assets (note 11)	15,000,000	13,125,000
Unrestricted net assets (note 12)	10,497,892	8,447,929
	<u>150,635,904</u>	<u>146,744,556</u>
	<u>155,802,806</u>	<u>151,649,658</u>

Approved by the Board of Directors

August 31, 2010

2010

2009

	Restricted for endowment purposes \$	Invested in property and equipment and intangible assets \$	Internally restricted \$	Unrestricted \$	Total \$	Total \$
<b>Balance –</b>						
<b>Beginning of year</b>	125,000,000	171,627	13,125,000	8,447,929	146,744,556	143,291,665
Excess (deficiency) of revenues over expenses for the year	–	(39,054)	–	3,930,402	3,891,348	3,452,891
Internally imposed restriction	–	–	1,875,000	(1,875,000)	–	–
Investment in property and equipment and intangible assets	–	5,439	–	(5,439)	–	–
<b>Balance –</b>						
<b>End of year</b>	125,000,000	138,012	15,000,000	10,497,892	150,635,904	146,744,556

## Statement of Changes in Net Assets

For the year ended August 31, 2010

	\$	\$
<b>Revenues</b>		
Interest	6,120,321	6,593,614
Gain (loss) on disposal of fixed income securities	(98,619)	212,250
Unrealized gain on marketable securities	4,065,486	2,322,724
Donations	60,531	51,902
	<u>10,147,719</u>	<u>9,180,490</u>
<b>Expenses</b>		
PIP	1,345,215	1,326,635
Scholarship program	1,795,070	1,863,618
Mentorship program	212,178	211,681
Fellowship program	1,082,416	662,303
Planning and administration (note 16)	769,707	608,069
Program delivery (note 16)	671,797	675,028
Investment counsel fees	379,988	380,265
	<u>6,256,371</u>	<u>5,727,599</u>
<b>Excess of revenues over expenses for the year</b>	<u>3,891,348</u>	<u>3,452,891</u>

## Statement of Revenues and Expenses

For the year ended August 31, 2010

## Statement of Cash Flows

For the year ended August 31, 2010

\$

\$

**Cash flows from****Operating activities**

Excess of revenues over expenses for the year	3,891,348	3,452,891
Items not affecting cash and cash equivalents		
Loss (gain) on disposal of fixed income securities	98,619	(212,250)
Unrealized gain on marketable securities	(4,065,486)	(2,322,724)
Amortization of property and equipment	35,916	40,579
Amortization of intangible assets	3,138	–
Amortization of deferred website development costs	9,757	2,661
Unrealized gain on long-term liabilities and interest expense	–	(106,132)
	<u>(26,708)</u>	<u>855,025</u>

## Changes in non-cash working capital components

Decrease (increase) in		
Interest receivable	48,578	255,386
Other receivables	(6,514)	66,004
Increase (decrease) in		
Accounts payable and accrued liabilities	(149,188)	177,572
Deferred revenue	–	(46,153)
Scholarships and fellowship prizes payable	410,988	523,577
Mentorships payable	–	5,000
	<u>303,864</u>	<u>981,386</u>
	<u>277,156</u>	<u>1,836,411</u>

**Investing activities**

Purchase of short-term investments	(12,496,794)	(115,696,086)
Proceeds on disposal of short-term investments	11,546,355	115,846,466
Purchase of fixed income securities	(78,671,552)	(86,195,392)
Proceeds on disposal of fixed income securities	79,404,788	82,717,505
Purchase of property and equipment and intangible assets	(5,439)	(13,860)
Deferred website development costs	(21,288)	(7,983)
	<u>(243,930)</u>	<u>(3,349,350)</u>

**Net change in cash and cash equivalents during the year** 33,226 (1,512,939)

**Cash and cash equivalents – Beginning of year** 373,116 1,886,055

**Cash and cash equivalents – End of year** 406,342 373,116

## Notes to Financial Statements

August 31, 2010

### **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. An independent and non-partisan Canadian charity, the Foundation was established as a living memorial to the former Prime Minister by his family, friends, and colleagues. The Foundation supports creative and critical thinkers who make meaningful contributions to critical social issues through scholarships, fellowships, mentorships and public interaction events.

The Foundation was officially registered with the federal government as a charitable organization on January 22, 2003.

## 2. Changes in accounting policies

In September 2008, the Canadian Institute of Chartered Accountants (“CICA”) amended Handbook Section 4400, “Financial Statement Presentation by Not-for-Profit Organizations”, to, among other things, clarify that revenues and expenses must be presented on a gross basis. The CICA also amended certain other sections applicable to not-for-profit organizations and introduced Section 4470, “Disclosure of allocated expenses by not-for-profit organizations”. These new accounting standards are applicable for fiscal years commencing on or after January 1, 2009. The Foundation adopted these changes during the current year with no impact on its financial statements.

In February 2008, the CICA published Section 3064, “Goodwill and Intangible Assets”. This new standard replaces Section 3062, “Goodwill and Other Intangible Assets”, and establishes standards for the recognition, measurement, presentation and disclosure of goodwill and intangible assets. These requirements are effective for interim and annual financial statements relating to fiscal years beginning on or after October 1, 2008. The Foundation adopted this standard effective September 1, 2009. The effect of the change was a reclassification of computer software from property and equipment to intangible assets. The related amortization has also been reclassified to amortization of intangible assets. The reclassification had no impact on the Foundation’s net assets.

In July 2009, the CICA amended Section 1506, “Accounting Changes”, to exclude from its scope changes in accounting policies upon the complete replacement of an entity’s primary basis of accounting. The amendments apply to interim and annual financial statements relating to years beginning on or after July 1, 2009. The Foundation adopted this rule effective September 1, 2009, and such adoption had no material impact on the Foundation’s financial statements.

## 3. Significant accounting policies

### Financial instruments

On September 1, 2007, the Foundation adopted Section 3855, “Financial Instruments – Recognition and Measurement”.

To reflect the adoption of this new standard, unrestricted net assets have been reduced by \$1,290,819 as at September 1, 2007 and the value of the marketable securities has been reduced by the same amount. Furthermore, long-term liabilities have been reduced by \$198,478 and unrestricted net assets have been increased by the same amount to reflect the fair value of the long-term liabilities.

### 3. Significant accounting policies continued

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 marketable securities 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 excess of revenues over expenses.
- Interest receivable 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 short-term maturity.
- Accounts payable, 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 short-term maturity, except for long-term liabilities, which are recorded at the discounted value at initial recognition.

#### Management estimates

The preparation of financial statements in conformity with generally accepted accounting principles 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 major financial institutions and balances with investment brokers.

#### Marketable securities

Marketable securities consist of short-, mid- and long-term debt instruments.



### 3. Significant accounting policies continued

#### Revenue recognition

##### *Contributions*

The Foundation follows the deferral method of accounting for contributions. Restricted contributions are recognized as revenue in the year in which the related expenses are incurred. Unrestricted contributions are recognized as revenue when received or as 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*

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

#### Scholars, Fellows and Mentors programs

Scholarships, prizes and honoraria 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 the scholar and fellow programs are multi-year commitments, changes in amounts committed are adjusted in the year 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 as follows:

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

Leasehold improvements are amortized on a straight-line basis over the term of the lease.

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%.

### 3. Significant accounting policies continued

#### Deferred website development costs

Incremental costs directly related to the development of the website and placing it into service are deferred when it is probable that they will have a future benefit. Such costs are charged to expenses on a straight-line basis over a period of three years. If the unamortized balance of these costs exceeds the expected recovery, the excess will be charged to expenses during the year.

These costs are expensed to the Public Interaction Program (“PIP”), as the public and internal websites are an important vehicle for enabling the exchange of information and ideas within the Trudeau Network, and for the promotion of enhanced public discourse on major societal issues.

#### 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 carrying amount exceeds its fair value, based on quoted market prices, when available, or on the estimated current value of future cash flows.

### 4. Capital disclosures

As at August 31, 2010, the Foundation’s capital structure consists of a \$125 million endowment from the federal government, internally restricted funds of \$15,000,000 and unrestricted net assets of \$10,497,892.

The federal government’s Funding Agreement stipulates that the endowment not be spent, but that the income it generates may be used for the Foundation’s purposes. Accordingly, the Foundation manages its capital with the following objectives:

- preserving the 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.

## 5. Short-term investments

Short-term investments comprise Canadian dollar denominated deposits and money market funds. These investments bear interest at a floating rate and mature no later than August 31, 2011.

## 6. Marketable securities

Marketable securities consist of Canadian government and corporate bonds. The Foundation's investments are exclusively in bonds rated no lower than "A" by at least one recognized credit rating agency. However, bonds with a maturity of over five years carry an "AA" rating, as required by the federal government's Funding Agreement with the Foundation.

The allocation of investments in fixed income securities by maturity date is as follows:

	2010			
	Less than 1 year \$	1 to 5 years \$	More than 5 years \$	Total \$
Fair value	1,452,740	79,260,294	71,051,412	151,764,446
Par value	1,406,610	74,423,000	65,909,000	141,738,610
Weighted average yield	5.12%	4.03%	3.80%	

	2009			
	Less than 1 year \$	1 to 5 years \$	More than 5 years \$	Total \$
Fair value	3,162,407	62,156,061	83,212,348	148,530,816
Par value	3,080,109	57,786,000	78,630,000	139,496,109
Weighted average yield	4.65%	4.60%	4.08%	

## 7. Property and equipment

	2010		2009	
	Cost	Accumulated amortization	Net	Net
	\$	\$	\$	\$
Office communication equipment	16,239	12,573	3,666	4,583
Furniture and fixtures	85,643	64,506	21,137	25,321
Computer equipment	82,981	61,411	21,570	24,675
Leasehold improvements	322,474	252,871	69,603	92,804
Artwork	9,020	–	9,020	9,020
	<b>516,357</b>	<b>391,361</b>	<b>124,996</b>	<b>156,403</b>

## 8. Intangible assets

	2010		2009	
	Cost	Accumulated amortization	Net	Net
	\$	\$	\$	\$
Computer software	50,495	37,479	13,016	15,224

## 9. Long-term liabilities

### a) Fellowship prizes payable

	2010	2009
	\$	\$
Current portion of fellowship prizes payable	890,022	597,514
Long-term portion of fellowship prizes payable in years ending		
August 31, 2011	–	310,707
2012	300,886	91,398
	<b>300,886</b>	<b>402,105</b>
	<b>1,190,908</b>	<b>999,619</b>

## 9. Long-term liabilities *continued*

### b) Scholarships payable

	2010	2009
	\$	\$
Current portion of scholarships payable	1,686,890	1,337,398
Long-term portion of scholarships payable in years ending		
August 31, 2011	–	967,496
2012	1,286,865	1,043,767
2013	594,605	–
	1,881,470	2,011,263
	3,568,360	3,348,661

Interest expenses included in program expenses using the effective interest rate method are as follows:

	2010	2009
	\$	\$
Scholarship program	90,805	88,449
Fellowship program	45,169	17,683
	135,974	106,132

## 10. Net assets restricted for endowment purposes

In March 2002, the Foundation entered into a funding agreement with the federal government whereby the latter provided an endowment of \$125 million to the Foundation for the purpose of establishing the Advanced Research in Humanities and Human Sciences Fund (“The Fund”). As per the agreement, the endowment bears no interest and must be capitalized in perpetuity. Only the income derived from the endowment can be used for the purposes of the Foundation. All revenues earned are reported in the statement of revenues and expenses of the Foundation.

In the event of a default by the Foundation, the government may terminate the agreement and require the Foundation to repay the funds not otherwise committed, in accordance with the agreement.

## 11. Internally restricted net assets

The Foundation's Board of Directors placed internal restrictions on a portion of the excess of revenues over expenses for the year. An annual amount of \$1.875 million is restricted each year to ensure the protection of the endowment. Internally restricted net assets are capitalized following the policies indicated in note 3.

## 12. Unrestricted net assets

Unrestricted net assets represent the cumulative excess of revenues over expenses which remains after the endowment, net assets invested in property and equipment and all internally restricted funds have been set aside. Unrestricted net assets comprise two distinct amounts: the cumulative growth of the Fund, which is subject to the conditions outlined in the funding agreement between the Foundation and the federal government; and the Private Donations Fund, which is not subject to the funding agreement, consisting of unrestricted private donations received by the Foundation.

	2010	2009
	\$	\$
Cumulative growth of the Fund	9,940,834	8,067,820
Private Donations Fund	557,058	380,109
<b>Total unrestricted net assets</b>	<b>10,497,892</b>	<b>8,447,929</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
Investment in fixed income securities	Fixed rates ranging from 2.00% to 8.75%
Interest receivable, other receivables and all liabilities	Non-interest bearing

## 14. Credit risk

The Foundation invests in major government and corporate short-term and fixed income securities according to established policies. The Investment Committee monitors these investments for credit risk. Management believes that there is no significant credit risk as at August 31, 2010.

## 15. Commitments

- a) In fiscal 2010, the Foundation has awarded 10 Mentors, four Fellows and 15 Scholars. In fiscal 2009, the Foundation awarded 10 Mentors, five Fellows and 15 Scholars. The maximum amounts committed with respect to travel and meetings are as follows:

	\$
Years ending August 31, 2011	1,187,005
2012	804,893
2013	339,651
2014	30,000

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

	\$
Years ending August 31, 2011	147,930
2012	147,930
2013	101,098
2014	7,433
2015	2,164

## 16. Schedule of expenses

	2010	2009
	\$	\$
<b>Planning and administration</b>		
Salaries and benefits	120,420	119,690
Rent and occupancy	151,360	153,475
Professional fees	177,721	127,058
Access to Information Act and Privacy Act	2,722	9,726
Communications, meeting and travel	167,566	81,442
Other employee expenses	22,360	6,606
Office expenses	88,131	69,186
Amortization of property and equipment	35,916	40,579
Amortization of intangible assets	3,138	-
Bank charges	373	307
	<u>769,707</u>	<u>608,069</u>
<b>Program delivery</b>		
Salaries and benefits	625,817	582,576
Professional fees	19,163	60,666
Outreach and communications	26,817	31,786
	<u>671,797</u>	<u>675,028</u>







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