



THE PIERRE ELLIOTT TRUDEAU FOUNDATION

Annual Report on the Access to Information Act

From September 1, 2008, to August 31, 2009

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A. INTRODUCTION

Legal Status

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.

The Pierre Elliott Trudeau Foundation funds outstanding scholars who conduct research in crucial societal issues, and creates opportunities for dialogue and collaboration across organizations and disciplines under four key themes: Human Rights and Dignity, Responsible Citizenship, Canada in the World, and People and their Natural Environment. Since being established, the Foundation has granted hundreds of major awards to top researchers and highly accomplished individuals, in Canada and abroad.

The Foundation is governed by a diverse and highly distinguished board of up to 18 directors, including two directors appointed by the Minister of Industry and two representatives of the family of the late Pierre Trudeau. Directors oversee the approximately \$150 million endowment and an annual operating budget of \$6.5 million, and they set policies and program directions for the Foundation.

Mission Statement

The Mission Statement adopted by the Board of Directors inspires the work of the Foundation, and shaped its Business Plan for 2008-2009.

MISSION STATEMENT

The Pierre Elliott Trudeau Foundation promotes outstanding research in the humanities and social sciences, and fosters a fruitful dialogue between scholars and policymakers in the arts community, business, government, the professions, and the voluntary sector.

The Foundation:

- *encourages emerging talent by awarding Trudeau Scholarships to the most talented doctoral students in Canada and abroad;*
- *appoints distinguished Trudeau Fellows and Mentors for their knowledge and wisdom to build an intellectual community to support the work of the Scholars; and*
- *creates and maintains an international network of Trudeau Fellows, Scholars, and Mentors.*

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 and essential organization is devoted to the delivery of four core programs: a unique funding model segmented in three 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.

Trudeau Scholarships

Up to fifteen Scholarships are awarded each year to support doctoral candidates pursuing research of compelling present-day concern, touching on one or more of the four themes of the Foundation. 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 element of the Scholarship program.

Trudeau Fellowships

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 for 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.

Trudeau Mentorships

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, young 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 Scholars to their networks.

Public Interaction Program

The Public Interaction Program (PIP) is the centrepiece that brings the three grant-giving programs together. The PIP events and the travel and research allocation 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 ensures that leading-edge researchers and Fellows, upcoming PhD Scholars and practical-minded Mentors bring their expertise together to make knowledge exchange and transfer a reality.

The PIP comes to life through four streams of annual Trudeau events. In addition, members of the Trudeau Community are encouraged to organize PIP events on major issues of public policy that affect Canadians and global society. Finally, we collaborate with other institutions and organizations to advance discussions in wider fields.

Access to Information at the Foundation

The Foundation has been listed as a federal institution and subject to the *Access to Information Act* since April 1, 2007. Although the Foundation's management, staff and directors firmly believe in a transparent and accountable management necessary to its charity status, the implementation of the Act has been a departure from our tradition of management as an independent corporation. This second year under the act has been one of learning, structuring and trying to adapt the best practices in place in federal institutions to our small and lean organization.

The *Access to Information Act* (R.S., 1985, c. A-1) was proclaimed on July 1, 1983. The purpose of the *Access to information Act* is to provide all individuals and corporate entities present in Canada a right of access to information in records under the control of a government institution in accordance with the principles that government information should be available to the public, that necessary exceptions to the right of access should be limited and specific and that decisions on the disclosure of government information should be reviewed independently of government.

Section 72 of the *Access to Information Act* requires that the head of every government institution prepare, for submission to Parliament, an annual report on the administration of the Act within the institution during each financial year.

This annual report is intended to describe how The Pierre Elliott Trudeau Foundation administered its responsibilities in the operation of the *Access to Information Act* from September 1, 2008 through to August 31, 2009.

B. ADMINISTRATION OF THE ACCESS TO INFORMATION ACT

Delegation of Authority

The President and CEO of the Foundation is designated as the head of the institution for the purpose of the *Access to Information Act*.

The Director of Corporate Services and Public Affairs has been delegated the authority to oversee the administration of the Act and to ensure compliance with the legislation (see Appendix D). The Director of Corporate Services and Public Affairs directly reports to the President and CEO of the Foundation.

Policies and Procedures

In 2007, the Foundation developed its *Access to Information Policy* on the administration of the legislation. All employees were notified of its public posting on the Foundation's web site. Employees are advised to contact the Director of Corporate Services and Public Affairs with questions or concerns.

It is Foundation policy to routinely release, in an informal manner, any information that does not qualify for an exemption or that is not excluded under the *Access to Information Act*. The

Foundation also provides access to its annual reports, external audits and evaluations from the public library on its web site at: www.trudeaufoundation.ca

The Pierre Elliott Trudeau Foundation, a small organization with limited resources mostly dedicated to its programs as required by the charity status and funding agreement, was already a highly transparent organization, and has had a comprehensive corporate governance structure in place to ensure effectiveness and accountability at all times prior to becoming subject to the Act.

In terms of procedures in handling the requests, we are keeping the same approach as the one adopted to operate our core programs. Upon reception of a request addressed to the Privacy Officer of the Foundation, the Director of Corporate Services and Public Affairs opens a file and makes sure that any required resources is called upon to ensure a swift and satisfactory treatment of the request. She relies mainly on external resources to support her in the processing of the requests and related requirements, which has significantly increased the operation costs of the Foundation (see Section C). The Foundation has a retainer with a law firm to receive legal advice on any aspects of the legislation. On-contract assistantship has also been secured to ensure proper administrative support during and in between the handling of requests as required.

Treasury Board Secretariat's guidelines on the *Access to Information Act* were followed during the reporting period. No significant changes were made to the Foundation's organization, programs, operations or policy.

Information Holdings

A description of the classes of institutional records held by the Foundation can be found in the Treasury Board Secretariat of Canada publications entitled *InfoSource – Sources of Federal Government Information 2008-2009* (Chapter 139) and *Sources of Federal Employee Information 2008-2009* (Chapter 139). The Foundation does not have exempt banks.

The above-mentioned publications can be found in public and academic libraries, constituency offices of federal members of Parliament, and on the Internet.

Reading Room

The boardroom at the Foundation's office in Montreal has been designated as the public reading room for the purpose of reviewing publications and other public materials.

Education and Training Activities

The Director of Corporate Services and Public Affairs continually provides advice and guidance to staff and requesters on compliance requirements of both pieces of legislation, by means of continuous dialogue. During the reporting report, no staff training was made.

Complaints

No complaints were filed against the Foundation with the Office of the Information Commissioner during this reporting period.

C. INTERPRETATION OF THE REPORT ON THE *ACCESS TO INFORMATION ACT*

The following is provided to assist the reader in the interpretation of the information reported in Appendix A.

Part I: Requests processed

During the reporting period, no new requests were received. One request, however, was received at the end of the previous reporting period, was carried forward and was completed during the 2008-2009 reporting period. According to the source designation provided on the Report on the Access to Information Act form, the request originated from an “Organization.”

Part II: Disposition of requests completed

In order to process the request carried forward from the previous reporting period mentioned in Part I, the Foundation has repeatedly requested a necessary clarification from the applicant. The Foundation considered the request abandoned thirty days after the applicant did not respond to a final notice asking for clarification.

Part III: Exemptions invoked

No exemptions were invoked during the reporting period.

Part IV: Exclusions cited

No exclusions were cited during the reporting period.

Part V: Completion time

The file processed was closed in 145 days, due to delays in response from the applicant.

Part VI: Extensions

No extensions beyond the prescribed time limit of 30 days were required during the reporting period.

Part VII: Translations

Translation services related to Access to Information requests were not required during this fiscal year.

Part VIII: Method of access

Not applicable.

Part IX: Fees

The Access to Information Act authorizes fees for certain activities related to the processing of formal requests under the Act. In addition to a \$5 application fee, search, preparation and

reproduction charges may also apply. The current fee structure is specified in the Access to Information Regulations. No fees are imposed for reviewing records, overhead or shipping costs. Moreover, in accordance with Section 11 of the Act, no fees are charged for the first five hours required to search for records, or to prepare any part of these for disclosure.

The Access to Information Act permits the waiving of fees when deemed to be in the public interest. The amount of \$5 was collected in the reporting period as application fees and no other fees were collected this year under the *Access to Information Act*.

Part X: Costs

In 2008-2009, the direct cost of administering the *Access to Information Act*, including information and training sessions and consulting fees, totalled \$8,746, consisting of approximately \$2,321 in salary costs for 0.02 person-years, and \$6,425 for administration costs. This year, the proportion reached \$8,746 per request processed.

Supplemental Reporting Requirements for 2008-2009

Appendix B and Appendix C were attached to the *Statistical Reports on the Access to Information and Privacy Acts Call Letter* (Implementation Report No. 114). The following is provided to assist the reader in the interpretation of the information reported in Appendices B and C with regards to the Access to Information Act.

No exemptions were invoked pursuant to Subsections 13(e), 14(a), or 14(b).

No exclusions were cited pursuant to Subsections 69.1(1).

No discrepancies were noted.

APPENDIX A

REPORT ON THE ACCESS TO INFORMATION ACT RAPPORT CONCERNANT LA LOI SUR L'ACCÈS À L'INFORMATION



Government of Canada /
Gouvernement du Canada

Institution La Fondation Pierre Elliott Trudeau / The Pierre Elliott Trudeau Foundation				Reporting period / Période visée par le rapport 2008-09-01 – 2009-08-31	
Source	Media / Médias 0	Academia / Secteur universitaire 0	Business / Secteur commercial 0	Organization / Organisme 1	Public 0

I Requests under the Access to Information Act / Demandes en vertu de la Loi sur l'accès à l'information	
Received during reporting period / Reçues pendant la période visée par le rapport	0
Outstanding from previous period / En suspens depuis la période antérieure	1
TOTAL	1
Completed during reporting period / Traitées pendant la période visées par le rapport	1
Carried forward / Reportées	0

II Disposition of requests completed / Disposition à l'égard des demandes traitées					
1.	All disclosed / Communication totale	0	6.	Unable to process / Traitement impossible	0
2.	Disclosed in part / Communication partielle	0	7.	Abandoned by applicant / Abandon de la demande	1
3.	Nothing disclosed (excluded) / Aucune communication (exclusion)	0	8.	Treated informally / Traitement non officiel	0
4.	Nothing disclosed (exempt) / Aucune communication (exemption)	0	TOTAL		1
5.	Transferred / Transmission	0			

III Exemptions invoked / Exceptions invoquées							
S. Art. 13(1)(a)	0	S. Art. 16(1)(a)	0	S. Art. 18(b)	0	S. Art. 21(1)(a)	0
(b)	0	(b)	0	(c)	0	(b)	0
(c)	0	(c)	0	(d)	0	(c)	0
(d)	0	(d)	0	S. Art. 19(1)	0	(d)	0
S. Art. 14	0	S. Art. 16(2)	0	S. Art. 20(1)(a)	0	S. Art. 22	0
S. 15(1) Art. International rel. / Relations intern.	0	S. Art. 16(3)	0	(b)	0	S. Art. 23	0
Defence / Défense	0	S. Art. 17	0	(c)	0	S. Art. 24	0
Subversive activities / Activités subversives	0	S. Art. 18(a)	0	(d)	0	S. Art. 26	0

IV Exclusions cited / Exclusions citées			
S. Art. 68(a)	0	S. Art. 69(1)(c)	0
(b)	0	(d)	0
(c)	0	(e)	0
S. Art. 69(1)(a)	0	(f)	0
(b)	0	(g)	0

V Completion time / Délai de traitement	
30 days or under / 30 jours ou moins	0
31 to 60 days / De 31 à 60 jours	0
61 to 120 days / De 61 à 120 jours	0
121 days or over / 121 jours ou plus	1

VI Extensions / Prorogations des délais		
	30 days or under / 30 jours ou moins	31 days or over / 31 jours ou plus
Searching / Recherche	0	0
Consultation	0	0
Third party / Tiers	0	0
TOTAL	0	0

VII Translations / Traduction		
Translations requested / Traductions demandées		0
Translations prepared / Traductions préparées	English to French / De l'anglais au français	0
	French to English / Du français à l'anglais	0

VIII Method of access / Méthode de consultation	
Copies given / Copies de l'original	0
Examination / Examen de l'original	0
Copies and examination / Copies et examen	0

IX Fees / Frais			
Net fees collected / Frais net perçus			
Application fees / Frais de la demande	5,00 \$	Preparation / Préparation	0,00 \$
Reproduction	0,00 \$	Computer processing / Traitement informatique	0,00 \$
Searching / Recherche	0,00 \$	TOTAL	5,00 \$
Fees waived / Dispense de frais		No. of times / Nombre de fois	\$
\$25.00 or under / 25 \$ ou moins	0	\$	0
Over \$25.00 / De plus de 25 \$	0	\$	0

X Costs / Coûts	
Financial (all reasons) / Financiers (raisons)	
Salary / Traitement	\$ 2,321
Administration (O and M) / Administration (fonctionnement et maintien)	\$ 6,425
TOTAL	\$ 8,746
Person year utilization (all reasons) / Années-personnes utilisées (raison)	
Person year (decimal format) / Années-personnes (nombre décimal)	0.02

APPENDIX C

Discrepancies	Divergences
N/A	S/O

APPENDIX D



MEMO

DESTINATAIRE / TO : Élise Comtois

EXPEDITEUR / FROM : Pierre-Gerlier Forest

DATE : Le 9 octobre 2007

OBJET / REGARDING : Délégation de pouvoirs – LAIPRP

Madame,

À titre de président et chef de la direction de la Fondation et en conformité avec l'article 73 de la Loi sur l'accès à l'information et de la Loi sur la protection des renseignements personnels, je désigne le titulaire du poste de Directeur des services de gestion et des affaires publiques, que vous êtes, pour exercer le pouvoir, les responsabilités et les devoirs du président comme chef de l'institution fédérale pour toutes les sections des deux Lois à laquelle la Fondation est assujettie.

Cette délégation prendra effet à compter d'aujourd'hui.

Meilleures salutations,



Pierre-Gerlier Forest, Ph.D.

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