



UNITING  
GREAT  
THINKERS  
TO INSPIRE  
US ALL



ANNUAL REPORT 2003-2004



## INTERDISCIPLINARY INTERGENERATIONAL AND INTERNATIONAL

The Pierre Elliott Trudeau Foundation establishes a unique dialogue between outstanding scholars in the social sciences and humanities, and creative individuals with an interest in issues of public policy in government, the professions, business, the arts, and the voluntary sector. Well beyond funding research, the Foundation's goal is to generate and enhance public debate on society's most pressing issues and to provide citizens of Canada and the world with a deeper experience of, and commitment to, democracy.

On behalf of the Board of Directors, it is an honour to deliver the annual report of the Trudeau Foundation for 2003-2004. This year saw remarkable growth in the programmes, and strength in the Foundation's financial position. New groups of Fellows and Scholars joined the Foundation community, as did the first group of Mentors. The nomination and selection processes were open and rigorous. The Board is delighted with the extraordinarily talented people now linked to the Foundation. With the creation of a critical mass of award holders, the challenge is now to build up the programme of seminars, workshops and conferences that will bring these wonderful people together and encourage increased interaction with the wider community. In 2003-2004 we planned the launch of the Trudeau Public Policy Conference, and began to organize events in collaboration with partners inside and outside Canada. I thank the Board and the talented staff for an exceptional year of hard work and achievement.

– ROY L. HEENAN, CHAIR

In this second year of operation, we began to see hints of the real promise of the Trudeau Foundation. I will never forget the first meeting of Trudeau Scholars, Fellows and Mentors held in autumn 2004 in Toronto. The passion, the commitment and the sparking of ideas was inspiring, even moving. I realized that our selection committees had done a wonderful job in identifying brilliant and creative people to hold various Trudeau awards. But the Foundation is much more than a funding agency. Because it is entirely non-partisan and does not promote particular policy agendas, the Foundation is an ideal convenor – creating unique space for democratic dialogue. Through public events, especially major Trudeau Public Policy Conferences, the Foundation will engage the wider society on issues of great concern. I hope that over the next few years, we will be able to expand the Canadian democratic space to include more and more thoughtful citizens in imagining and working for a better world. – STEPHEN J. TOOPE, PRESIDENT



## Who We Are

The Pierre Elliott Trudeau Foundation began operations in 2002. Its fiscal and reporting year runs from September 1<sup>st</sup> to August 31<sup>st</sup>.

The Foundation seeks to address pressing social and public policy issues by creating an innovative international network of study and intellectual exchange. Recognizing that ideas matter, but that ideas are most influential when they are effectively shared and debated, the Foundation identifies and supports creative individuals who want to make a difference to the communities in which they live, and enables them to participate in the debates that will shape our collective future.

Pierre Trudeau believed that a mature and confident Canada could make outstanding contributions to the wider world. The Foundation is dedicated to the proposition that Canadians have much to offer to each other and to world society. We need to learn together and to celebrate the accomplishments of our gifted citizens and residents. We also need to reach out to include in our debates the perspectives of outstanding thinkers from outside Canada. Just as a country is built every day through the construction of basic shared values, global society is built through the constant negotiation of diverse values. The Foundation seeks to create possibilities for Canada's future in an increasingly interconnected yet complex world.

Entirely non-partisan, the Foundation strives to give voice to a wide variety of perspectives.

The work of the Foundation focuses on four themes that shaped the life and career of Pierre Elliott Trudeau. These themes are explored in domestic and international contexts:

### HUMAN RIGHTS AND SOCIAL JUSTICE

The pursuit and entrenchment of civil, political, economic and social rights was a major achievement of the twentieth century. Today, fundamental debate continues on issues of diversity and inclusion, fairness, substantive equality, and tolerance. Where have we failed to uphold the human rights of particular groups or individuals? How do societies built on the contributions of diverse peoples, with shifting patterns of migration, generate inclusively shared commitments to human rights and social equality?

### RESPONSIBLE CITIZENSHIP

Citizens are not merely people with rights. They are individuals with a capacity and responsibility to influence, build and transform their communities, their countries, and global society. What does it mean to be involved in the life of the community, and how can that involvement be facilitated through the activities of governments, corporations, civil society organizations, and other social groups and movements?

### CANADA AND THE WORLD

As citizens of a wealthy country with a small population, how do Canadians relate to the wider world of states, international organizations and transnational groups? Are there unique Canadian values, or traits of our society, that we might constructively promote and share? Like all participants in global society, Canadians have a mutual responsibility for the welfare of all the world's peoples. Canada has a history of promoting human rights and the peaceful resolution of conflict, but that tradition may need reinforcement or redefinition.

### HUMANS AND THEIR NATURAL ENVIRONMENT

We are blessed with a bounteous endowment of natural beauty and natural resources. Yet environmental stresses affect not only our major cities, but the wilderness as well. All around the globe, people are trying to understand the concept of sustainable development, which seems to make intuitive sense, but lacks precision. Canada's small population and huge size is no shield from global forces of environmental degradation. Canada's wealth of nature may generate a special responsibility not only to protect the environment but also to interpret nature to the human family.

## The Programmes

### SEEKING OUT TALENT

## Fellows

The Trudeau Fellows Programme seeks out and promotes the finest thinkers in a range of disciplines in the humanities and social sciences, naming up to five Fellows each year. The Trudeau Fellows Prizes recognize outstanding achievement and provide support for Fellows to continue to make extraordinary contributions in their fields. Trudeau Fellows are innovative in their approaches to issues of public policy concern and are committed to public engagement.

The Foundation seeks nominations for the Trudeau Fellows Prizes on an ongoing basis from external advisors who are nationally and internationally recognized leaders in academia, government, business, the voluntary sector and the arts. Nominations are researched and reviewed by Foundation staff and evaluated by an external committee of distinguished assessors before being presented to the Board of Directors for consideration and final selection. The Foundation currently considers roughly 160 active nominations for Fellows Prizes. Names of people who

are not selected will remain in an active database for three years, with new nominees being added annually. It is anticipated that over the next two or three years, between 200 and 250 nominees will be considered for the Trudeau Fellows Prize.

The Foundation does not accept applications for the Trudeau Fellows Prize from individuals. Trudeau Fellows may be Canadian or foreign nationals.

The selection criteria for the Trudeau Fellows Prize are: (1) creative thinking to the highest international standards of the given discipline; (2) an outstanding ability to communicate the results of research to other researchers and scholars, and to the general public; (3) a commitment to work with Foundation Scholars and Mentors; and (4) interest in one or more of the four themes of the Foundation, and a desire to contribute to public dialogue around those themes.

The Trudeau Fellows Prize is \$150,000 paid over three years, with an additional \$25,000 per year available for approved travel and expenses within the framework of the Foundation's programmes. Trudeau Fellows are linked with Foundation Scholars and Mentors through various community-building activities.

### TRUDEAU FELLOWS 2003 AND 2004

#### ANN DALE

Canadian Research Chair in Sustainable Community Development, Science, Environment and Technology Division, Royal Roads University

#### JANICE GROSS STEIN

Belzberg Professor of Conflict Management and Negotiation, Department of Political Science, Director, Munk Centre for International Studies, University of Toronto (see inset page 4)

#### DANIELLE JUTEAU

Professor, Department of Sociology, University of Montreal

#### DAVID LEY

Canada Research Chair in Geography, Department of Geography, University of British Columbia

#### RODERICK A. MACDONALD

F.R. Scott Professor of Constitutional and Public Law, Faculty of Law, McGill University

#### ROHINTON MISTRY

Writer; Governor-General's Literary Award winner

#### DONALD J. SAVOIE

Executive Director, Canadian Institute for Research on Regional Development; Clément-Cormier Chair in Economic Development and Professor of Public Administration, University of Moncton (see inset page 4)

#### JAMES HAMILTON TULLY

Distinguished Professor of Political Science, Law, Indigenous Governance and Philosophy, University of Victoria

#### DANIEL M. WEINSTOCK

Canada Research Chair in Ethics and Political Philosophy, Department of Philosophy, Director of Ethics Research Centre, University of Montreal

The classical scope of responsibility – to one’s own person, to one’s own family, to one’s community and nation – must be broadened. Not even the biblical admonition of responsibility to all humans is sufficiently broad. The new responsibility must be more. It must extend to all space and through all time. It must be inclusive of persons far beyond our own national frontiers; it must encompass the physical planet and all its ingredients – water and air, non-renewable resources, living organisms; it must extend into the future not just for months or years, but for decades.

– PIERRE ELLIOTT TRUDEAU



Trudeau Fellow

**DONALD J. SAVOIE**

Executive Director and Founder of the Canadian Institute for Research on Regional Development

Clément-Cormier Chair in Economic Development, Université de Moncton

Professor Donald J. Savoie has held senior positions with the Government of Canada, including Assistant Secretary of the Treasury Board and Deputy Principal of the Canadian Centre for Management Development. He has served as an advisor to several federal, provincial and territorial government departments and agencies, the private sector, independent associations, the OECD, the World Bank, and the United Nations. He has published 35 books, including *Breaking the Bargain: Public Servants, Ministers, and Parliament* (2003), and *Governing from the Centre: The Concentration of Power in Canadian Politics* (1999). In 1999, Professor Savoie was awarded the Vanier Gold Medal by the Institute of Public Administration of Canada for “having made a significant contribution in the field of public administration in Canada”. Dr. Savoie is a fellow of the Royal Society of Canada (1992) and an Officer of the Order of Canada (1993).



Trudeau Fellow

**JANICE GROSS STEIN**

Belzberg Professor of Conflict Management and Negotiation

Director of the Munk Centre for International Studies, University of Toronto

Professor Janice Stein has an international reputation as a Middle East area specialist and is a pioneer in at least three fields of political science: negotiation theory, foreign policy decision-making and international conflict management. As a Middle East specialist, Professor Stein has provided compelling explanations of the patterns of conflict and cooperation, and of war and peace, between Egypt and Israel from the 1960s to the present. Professor Stein was also the first scholar to establish the pivotal importance of pre-negotiation to international bargaining. Professor Stein has advised the American Association for the Advancement of Science and the United States Institute for Peace. She has also been Chair of the Research Advisory Board of the Minister of Foreign Affairs and Chair of the advisory Board to the Canadian Centre for Foreign Policy Development. She is on the editorial board of several scholarly journals, including *Foreign Policy*, and is a Fellow of the Royal Society of Canada. Her latest book is entitled *The Cult of Efficiency* (2003).

## Scholars

The Trudeau Scholars Programme grants up to fifteen new scholarships every year to outstanding doctoral candidates in the humanities and social sciences. The Foundation supports doctoral candidates pursuing research of compelling present-day concern, touching upon one or more of the four themes of the Foundation. Trudeau Scholars are actively engaged in their fields, in which they are expected to become leading national and international figures.

Trudeau Scholars are selected through a process that involves nomination by a university, an application supported by references and transcripts, internal and external review

and selection panels, an interview, and the formal approval of the Board of Directors. This year, 115 exceptional students were considered by the Foundation for Trudeau Scholarships.

The assessment of nominees for Trudeau Scholarships focuses on the following criteria: (1) academic achievement at the level of the most competitive scholarship programmes worldwide; (2) an outstanding ability to engage in lively exchange with other researchers and scholars; and (3) the intention to work in an area related to one or more of the four themes of the Foundation, and a desire to contribute to public dialogue around those themes.

Up to twenty-five percent of Trudeau Scholars may be foreign nationals studying in Canada.

### TRUDEAU SCHOLARS 2003 AND 2004

NAME	CURRENT UNIVERSITY	PROGRAMME OF STUDY	DOCTORAL THESIS
<b>Caroline Allard</b>	University of Montreal	Philosophy	The Foundations of Moral Responsibility of Government and Private Sector Actors in Matters of Global Social Justice
<b>Anna-Liisa Aunio</b>	McGill University	Sociology	Negotiating the Environment: International NGOs, States, and Transnational Corporations
<b>Jay Batongbacal</b>	Dalhousie University	J.S.D. (Law)	Coastal Communities and Ocean Energy Resource Developments: Advancing the Principle of Participatory Decision-Making in National and International Law
<b>Jillian Boyd</b>	University of Toronto	J.S.D. (Law)	Competing Claims to Equality: Inter-Minority Conflict in Equality Jurisprudence and Theory
<b>Ken J. Caine</b>	University of Alberta	Rural Sociology	Beyond Co-Management? Understanding Community-Based Resource Management in Déline, NWT, Canada
<b>Colleen M. Davison</b>	University of Calgary	Community Health Sciences (Health and Society Research Specialty)	Re-Framing “Aboriginal School Drop-out”: Examining Patterns of Disengagement and Resiliency in Northern Canada
<b>Nora Doerr-MacEwen</b>	University of Waterloo	Planning	Strategies to Minimize the Environmental Impacts of Pharmaceuticals and their Metabolites
<b>Pascale Fournier</b>	Harvard Law School	S.J.D. (Law)	The Legal Dualities of Muslim Women in Constitutional Liberal States
<b>Julie Gagné</b>	Laval University	History	Historians, Filmmakers and the Traumatic Colonial Experience of Belgium and the Congo
<b>Margarida Garcia</b>	University of Quebec at Montreal	Sociology	Human Rights and Obstacles to Innovation in Canadian Criminal Law
<b>Ginger Gibson</b>	University of British Columbia	Mining Engineering Applied Sciences	Vulnerability and Resilience in Aboriginal Communities: Mining as a change agent in the Northwest Territories
<b>Robert Huish</b>	Simon Fraser University	Geography	The Latin American School of Medicine: Popular Health Provision through Grassroots Participation

**TRUDEAU SCHOLARS 2003 AND 2004 continued**

NAME	CURRENT UNIVERSITY	PROGRAMME OF STUDY	DOCTORAL THESIS
<b>Alenia Kysela</b>	University of Toronto	Anthropology	Equitable and Operationalized HIV Primary Health Care in Under-Resourced Settings: The Cambodia Case
<b>Patti-Ann LaBoucane-Benson</b>	University of Alberta	Human Ecology	Aboriginal Family Resilience: Promoting Cultural Survival and Community Health
<b>Meme D. Lavell-Harvard</b>	University of Western Ontario	Education	Success at any Cost: A Study of Successful Aboriginal Academics
<b>Robert Leckey</b>	University of Toronto	S.J.D. (Law)	Law's Understanding of Individuals
<b>David Mendelsohn</b>	McGill University	Islamic Studies	Two Cultures: One Land
<b>James Milner</b>	University of Oxford	Development Studies	Host State Security, Burden Sharing and Refugee Protection in Africa
<b>Robert Lee Nichols</b>	University of Toronto	Political Science	The Promise of Language
<b>Alain-Désiré Nimubona</b>	HEC Montréal	Administration	The Contribution of the Environmental Services Industry to Environmental Policymaking
<b>Rebecca Pollock</b>	Trent University	Canadian Studies	Local Knowledge and Landscape Governance: Experience from Three Canadian Biosphere Reserves
<b>Karen Rideout</b>	University of British Columbia	Resource Management and Environmental Studies	Food, Trade, and Human Rights - Food and Nutrition Security in a Globalized Food System
<b>Louis-Joseph Saucier</b>	University of Quebec at Montreal/University of Paris I Pantheon-Sorbonne	Sociology	Shared Millennia: Promotion and Conciliation of the Concept of Long Time by Environmentalists - Comparative Analysis of Four Key Fields in Environment
<b>Anna Stanley</b>	University of Guelph	Human Geography & Environmental Resource Geography	An Evaluation of In/Justice in Canada's Nuclear Fuel Waste Management Discourse
<b>Sophie Thériault</b>	Laval University	LL.D. (Law)	Legal Protection of Subsistence and Sustainable Food Security for the Inuit
<b>Grégoire Webber</b>	University of Oxford	Law	Canadian Constitutional Culture: The Idea of Justification

Scholarships are tenable for three years, with a possible extension for a fourth year upon proof of satisfactory progress. The stipend is \$35,000 per year, to include the cost of tuition and reasonable living expenses. An additional \$15,000 per year is available to support approved research-related travel, and to cover expenses associated with events and joint projects undertaken within the framework of the Foundation's programmes.

Trudeau Scholars are required to spend a portion of their time during the tenure of their award at an institution or fieldwork location away from their home university, and outside the province in which that university is located. This time away may be spent inside or, when related directly to the Scholar's research, outside Canada. Trudeau Scholars

are encouraged to work directly with one or more Trudeau Fellows or Trudeau Mentors, wherever the Fellows or Mentors are based.

**The Trudeau Foundation Scholarship provides support and scholarly exchange that will be indispensable in helping me enhance the quality, relevance and societal impact of my research. It is a key that will open many doors, a key that is both a great honour and a distinct responsibility to receive. – COLLEEN DAVISON, 2004 SCHOLAR**



**JAY BATONGBACAL**

A native of the Philippines, Jay Batongbacal is studying towards his Ph.D. in Law at Dalhousie University. Winner of an Honorary Killam Scholarship and a scholarship from the Canadian International Development Agency (CIDA), he hopes to become an expert on participatory processes in the development of coastal and marine energy resources in Southeast Asia and the Asia-Pacific.



**JULIE GAGNÉ**

An aficionado of history and winner of many awards and scholarships, Julie Gagné travels through Congo and Belgium, video camera in hand, to better understand the colonial and post-colonial experiences of former colonizers and the people they colonized. She is conducting research towards her Ph.D. in History at Université Laval.

**The Trudeau Foundation scholarship is for me a double honour. The Foundation has not only recognized the work I have undertaken to understand socio-economic problems that exist in the world today, but has also encouraged me to intensify my efforts to contribute to the development of knowledge that will help assure a better future for all.**

– ALAIN-DÉSIRÉ NIMUBONA, 2004 SCHOLAR



**PATTI-ANN LABOUCANE-BENSON**

As a Métis woman, Patti-Ann LaBoucane-Benson is well aware that the media all too often portray Aboriginal families in a negative light. Pursuing a Ph.D. in Human Ecology at the University of Alberta with a doctoral fellowship from the Social Sciences and Humanities Research Council of Canada, she is working to build on family strengths and to develop a framework for preserving and advancing the culture of the Aboriginal family.



**DAVID MENDELSON**

A Montreal native, David Mendelsohn is a master of Hebrew, French and Arabic, not to mention his native English. During a three-year stay in Israel, he realized that the socio-linguistic factor can explain, at least in part, the problems the two peoples experience in reconciling their differences. His hope is that his research will promote better understanding between the two cultures and contribute to the peace effort. Winner of several scholarships and research fellowships, he is studying towards a Ph.D. in Islamic Studies at McGill University.



**KAREN RIDEOUT**

Her volunteer work in India at a shelter for women and children was a revelation for this young woman from St. John's, Newfoundland and Labrador. In fact, Karen Rideout formed the strong conviction that food insecurity is not simply a problem of developing countries but a world-wide social and political problem. Winner of numerous awards and scholarships, she is studying towards her Ph.D. in Natural Resources and Environmental Studies at the University of British Columbia.

## Mentors

The Trudeau Mentors Programme is the principal means by which the Foundation links together outstanding professionals who pursue policy analysis and implementation in their daily work, with exceptional researchers and scholars. Up to twelve creative professionals working in Canada or abroad will be appointed Trudeau Mentors each year. They continue working in their various occupations, but are connected to the network of Trudeau Fellows and Scholars, and are specifically assigned to work with Scholars.

The Foundation invites nominations for Mentorships on an ongoing basis in consultation with external advisors who are nationally and internationally recognized leaders in academia, government, business, the voluntary sector and the arts. Mentorship nominees are researched and reviewed by the Foundation and evaluated by an external committee of assessors before being presented to the Board of Directors for consideration and final approval. The Foundation currently considers roughly 120 active nominations for Trudeau Mentorships. Names of people not selected will remain in an active database for three years, with new nominees being

added annually. It is anticipated that over the next two or three years, between 150 and 200 nominees will be considered for a Trudeau Mentorship. The announcement of the first Trudeau Mentors took place in October 2003.

The selection criteria for Trudeau Mentorships are: (1) outstanding creativity in policy analysis and implementation in government, business, the voluntary sector, the professions or the arts; (2) a strong ability to engage in lively exchange with other policy professionals, researchers and scholars; (3) a commitment to work directly with Foundation Scholars; and (4) interest in one or more of the four themes of the Foundation, and a desire to contribute to public dialogue around those themes.

The Foundation does not accept applications for Trudeau Mentorships from individuals. Trudeau Mentors may be Canadian or foreign nationals.

Mentorships are tenable for one year, but are renewable for a second year (within the total number of mentorships available). The honorarium is \$20,000 per year. An additional \$15,000 is available to Mentors to cover approved expenses associated with events and joint projects undertaken within the framework of the Foundation's programmes.

Trudeau Mentor

**KEN WIWA** Journalist, Author, Cultural Activist

Ken Wiwa is one of the world's most influential human rights activists and authors. Mr. Wiwa travels to Nigeria several times a year, and is working toward the establishment of the Ken Saro-Wiwa Foundation, an organization that will set up a secondary school in the Ogoni region and offer scholarships to Ogoni children. He is an unflinching champion for the claims and rights of his people in debates over the effects of globalization on the nation state in Africa, cultural diversity, ethnic identity and the environment. He writes for various newspapers and magazines around the world, including several in Britain and Africa, and he is a regular contributor to Toronto's *Globe and Mail*. Mr. Wiwa is a Saul Rae Fellow at the Munk Centre for International Studies at the University of Toronto.



## The Programme on Academic Exchange and Public Engagement (AIPE)

### DRAWING PEOPLE TOGETHER

The ambitious goal of the Trudeau Foundation is to promote enhanced discourse on major issues of public policy. This lofty goal is made more specific in that the Foundation supports researchers and creative workers in the social sciences and humanities, and attempts to link them with policy-interested people in government, business, the arts, the professions, and the voluntary sector. At its meeting in April 2004, the Foundation's Board affirmed that it is interaction amongst the Fellows, Scholars and Mentors, and engagement with a wider informed public that will generate new ideas and heightened opportunities for democratic participation. For that reason, a fourth programme element was added to the Foundation's strategic plan: the Academic Exchange and Public Engagement Programme (AIPE). The AIPE Programme is the framework for activities bringing together the Foundation's three other programmes, Fellowship Prizes, Scholarships and Mentorships. It also serves as the vehicle for the Foundation's engagements in the public sphere.

It is fundamental to the philosophy of the Foundation that programme beneficiaries – Fellows, Scholars and Mentors – meet together on a regular basis. Electronic communications open up remarkable possibilities for connecting with people to share ideas, while face-to-face meetings go several steps further in creating joint enterprise and an active community. Such meetings are built into the funding structure of the various Trudeau Foundation awards. As the Foundation expands its internal network of award winners, creative opportunities will be found to connect that network with a broader informed public, through the holding of pan-Canadian and international conferences, lectures and seminars.

Last spring, the Trudeau Scholars met to focus upon the proposed theme for the first Trudeau Public Policy Conference: "Sharing Knowledge Across Cultural Borders

and Security Barriers". The full community of Fellows, Scholars and Mentors also met to discuss papers prepared by four Trudeau Fellows in preparation for the Conference, which would take place in October 2004 (details in the 2004-2005 Annual Report). The Foundation also facilitated informal gatherings of smaller groups of Scholars, and worked to ensure that connections were built up between Scholars, Fellows and Mentors. In addition, Foundation staff planned for a series of seminars to be launched in the autumn of 2004 after the first Public Policy Conference. The Foundation also worked to develop joint conference initiatives for 2005 with the 21<sup>st</sup> Century Trust (London, England), and the Institute for Research on Public Policy (Montreal).

The Foundation has begun to engage with a wider public as well, first by reaching out to leaders in civil society, business, journalism and government in planning for our public policy conferences. The Foundation also played its role as convenor in hosting a dialogue between leading Canadian foundations and the Social Sciences and Humanities Research Council of Canada (SSHRC), as part of the latter's long-term planning initiative. This was the first time that the SSHRC had met with foundations to explore the possibility of joint initiatives. In addition, efforts were made to connect with the media. The President of the Foundation met with editorial boards of leading Canadian newspapers. Articles on the Foundation and its awards appeared in campus newspapers across the country, and in newspapers such as *Le Devoir*, *The Toronto Star*, *The [Montreal] Gazette*, *The Edmonton Journal*, *The Globe and Mail*, *The [Halifax] Daily News*, and *The National Post*. In addition, articles on Trudeau Scholarship awards were carried in community newspapers throughout Canada. Trudeau Scholars published opinion pieces in *The Toronto Star* and *The Lawyer's Weekly*. A cover story on the Foundation, richly illustrated, ran in the magazine *NUVO*.

### 2004 MENTORS

#### LOUISE ARBOUR

High Commissioner for Human Rights, United Nations

#### ALLAN E. BLAKENEY

Visiting Scholar, College of Law, University of Saskatchewan;  
former Premier of Saskatchewan

#### ELIZABETH DOWDESWELL

President, Nuclear Waste Management Organization

#### L. YVES FORTIER

 Chairman, Ogilvy Renault

#### MICHAEL HARCOURT

Chairman, International Centre for Sustainable Cities;  
former Premier of British Columbia

#### JUDITH MAXWELL

President and founder, Canadian Policy Research Networks

#### KEN WIWA

Journalist, Author and Human Rights Activist



## Governance

### THE BOARD

The Trudeau Foundation is governed by a distinguished, independent and pan-Canadian Board of Directors. During 2003-2004, the Board met on two occasions. Board Members serve for renewable terms of two years.

### TRUDEAU FOUNDATION BOARD OF DIRECTORS

**ROY L. HEENAN** Chair of Heenan Blaikie and Chair of the Trudeau Foundation Board of Directors\*

**WILLIAM G. DAVIS** former Premier of Ontario

**PAUL DESMARAIS JR** Chair of the Board of Power Corporation of Canada

**LOUISE FRÉCHETTE** Deputy Secretary-General of the United Nations

**ALEXANDER HIMELFARB** Clerk of the Privy Council

**CHAVIVA HOŠEK** President of the Canadian Institute for Advanced Research\*

**ROBERT LACROIX** Rector of the University of Montreal

**MARC LALONDE** Senior Counsel of Stikeman Elliott

**PAULE LEDUC** former Rector of the University of Quebec at Montreal

**E. PETER LOUGHEED** former Premier of Alberta

**MARTHA PIPER** President of the University of British Columbia

**ROBERT RAE** former Premier of Ontario

**MARC RENAUD** President of the Social Sciences and Humanities Research Council

**SEAN RILEY** President of St. Francis Xavier University

**ALEXANDRE TRUDEAU** documentary filmmaker\*

**MILTON K. WONG** Chair of HSBC Asset Management Canada Inc.

\*Denotes membership on the Executive Committee of the Board

The four standing committees of the Board met regularly to further the work of the Foundation. The **Finance and Investment Committee** examined budget and investment policies, reviewed budgets and oversaw the management of the investment portfolio. On the advice of the Finance and Investment Committee, the Board continued to retain Harris/BMO Private Banking and RBC Private Banking as external investment managers. The **Audit Committee** ensured that the Foundation's commitment to financial transparency was met, and oversaw the process of independent auditing. In 2003-2004, PricewaterhouseCoopers LLP served as the Foundation's auditors. The **Application and Nomination Review Committee** vetted all lists of proposed programme beneficiaries (Fellows, Mentors and Scholars) before final presentation to the Board of Directors. The **Executive Committee** of the Board also met on occasion to deal with urgent matters between the regular meetings of the Directors. Whenever possible, meetings of committees take place by conference call to limit costs. However, meetings of the Audit Committee take place in person in Montreal.



TOP: THE OFFICES OF THE FOUNDATION IN MONTREAL.  
MIDDLE LEFT: GRÉGOIRE WEBBER, TRUDEAU SCHOLAR.  
MIDDLE RIGHT: ELIZABETH DOWDESWELL, TRUDEAU MENTOR.  
BOTTOM: JOSÉE ST-MARTIN, PROGRAMMES ADMINISTRATOR AND DAVID MENDELSON, TRUDEAU SCHOLAR.



The first thing to ask of history is that it should point out to us the paths of liberty. The great lesson to draw from revolutions is not that they devour humanity, but rather that tyranny never fails to generate them.

— PIERRE ELLIOTT TRUDEAU



TOP: ROY L. HEENAN, CHAIR OF THE BOARD OF DIRECTORS.  
MIDDLE: ALEXANDRE TRUDEAU, MEMBER OF THE BOARD OF DIRECTORS.  
BOTTOM: JILLIAN BOYD, TRUDEAU SCHOLAR, WITH HER FAMILY.  
BOTTOM RIGHT: JACQUES HÉBERT AND CAROLINA GALLO-LA FLÈCHE, MEMBERS OF THE FOUNDATION.



## THE MEMBERS

Members of the Trudeau Foundation, a remarkable group of Canadians from many walks of life, provide general oversight for the Foundation. They meet once a year at an Annual General Meeting, this year held in November in Montreal. Although they have no direct administrative authority, except in the appointment of auditors and the selection of new Board Members, their guidance is invaluable.

## MEMBERS OF THE TRUDEAU FOUNDATION

**PATRICIA E. BOVEY** Winnipeg

**DENNIS M. BROWNE** St John's

**JAMES A. COUTTS** Toronto

**WILLIAM G. DAVIS** Toronto

**CAROLINA GALLO-LA FLÈCHE** Montreal

**EILEEN E. GILLESSE** Toronto

**JACQUES HÉBERT** Montreal

**ROY L. HEENAN** Montreal

**LOUISE HOULE** Montreal

**EDWARD JOHNSON** Montreal

**MARC LALONDE** Montreal

**JOSEPH MACINNIS** Toronto

**BRUCE MCNIVEN** Montreal

**ROBERT MURDOCH** Salt Spring Island

**PHILIP OWEN** Vancouver

**PATRICK PICHETTE** Montreal

**MICHAEL PITFIELD** Montreal

**ROY ROMANOW** Saskatoon

**ALEXANDRE TRUDEAU** Montreal

**JUSTIN TRUDEAU** Montreal

## THE STAFF

The staff of the Foundation is drawn from the university, business and professional worlds. Foundation staff propose strategic directions to the Board, administer the day-to-day operations of the Foundation, serve programme beneficiaries, work to build up the Trudeau Foundation community, and promote the work of the Foundation within the academic community and with the wider public.

**BETTINA B. CENERELLI** Programmes Administrator (AIPE)

**LINDA FIBICH** Executive Assistant and Office Manager

**STÉPHANIE FOREST** Receptionist

**PETER SAHLAS** Executive Programme Director

**JOSÉE ST-MARTIN** Programmes Administrator (Scholarships)

**STEPHEN J. TOOPE** President

## SPACE FOR DEMOCRATIC DIALOGUE

Seeking out and encouraging talent is at the heart of the work of the Trudeau Foundation. But the ambition is greater: to realize fully the Foundation's unique ability to draw diverse groups together and to bridge the worlds of scholarship and public policy – in short to create a richer space for democratic dialogue in Canada. We began to build this space in 2003-2004, though we know that fulfilling the ambition will require time and patience. Yet the promise is real, if we continue to find great thinkers who can inspire us all. One of our 2004 Scholars, Robert Huish, recently observed that his award is “an opportunity to explore the places of this world that are hurting as a result of too much inequality and too little understanding. To me this scholarship is a commitment to discuss, with the academy and the public, the nature



of the beauties and sorrows that we, as communities and societies, are all capable of producing.” This is another way of thinking through the possibilities of the Trudeau Foundation. As Robert suggests, we are all capable of producing both beauties and sorrows. But our commitment to discuss, to engage in open dialogue, can point the way towards a little more beauty and a little less sorrow.

**For detailed information on the Trudeau Foundation, please visit [www.trudeaufoundation.ca](http://www.trudeaufoundation.ca)**

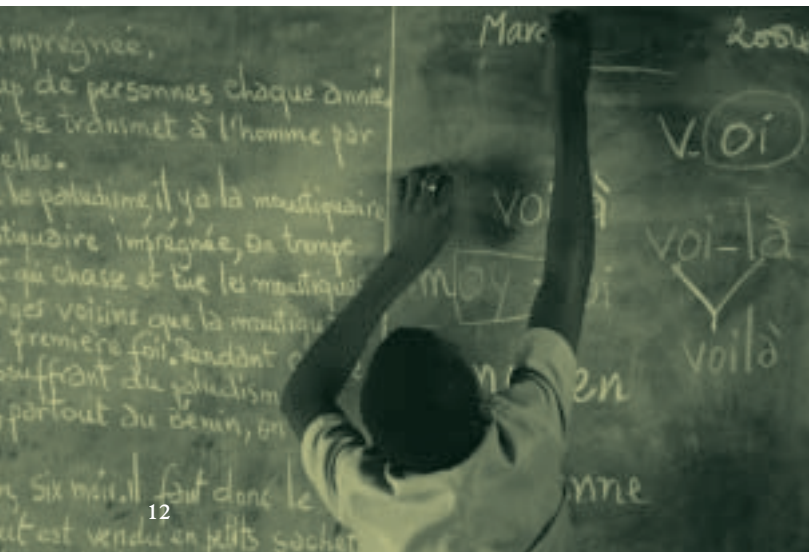
The Pierre Elliott Trudeau Foundation  
1514 Doctor Penfield Avenue, 2<sup>nd</sup> Floor  
Montreal, Quebec H3G 1B9 Canada  
Tel: 514.938.0001  
Fax: 514.938.0046  
E-mail: [tinfo@trudeaufoundation.ca](mailto:tinfo@trudeaufoundation.ca)

**APPENDIX A** Audited Financial Statements 2003-2004

[WWW.TRUDEAUFUNDATION.CA](http://WWW.TRUDEAUFUNDATION.CA)

**To me this scholarship is a commitment to discuss, with the academy and the public, the nature of the beauties and sorrows that we, as communities and societies, are all capable of producing.**

– ROBERT HUISH, 2004 SCHOLAR





October 6, 2004

**La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation**

Financial Statements  
August 31, 2004

**Auditors' Report**

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** as at August 31, 2004 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, 2004 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*

Chartered Accountants

**La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation**

Statement of Financial Position  
As at August 31, 2004

	2004 \$	2003 \$
<b>Assets</b>		
<b>Current assets</b>		
Cash	147,054	5,600,250
Short-term investments (note 3)	1,401,537	5,631,431
Investment in fixed income securities (quoted value \$135,521,466; 2003 – \$120,825,825) (note 4)	132,553,146	118,826,366
Interest receivable	1,574,426	1,601,530
Other receivables	85,372	94,151
	<u>135,761,535</u>	<u>131,753,728</u>
<b>Property and equipment</b> (note 5)	357,356	411,437
<b>Deferred Web site development costs</b> (accumulated amortization of \$69,761; 2003 – \$30,497)	48,030	60,995
	<u>136,166,921</u>	<u>132,226,160</u>
<b>Liabilities</b>		
<b>Current liabilities</b>		
Accounts payable and accrued liabilities	107,229	157,507
Current portion of fellowship prizes payable	450,000	200,000
Current portion of scholarships payable	483,706	454,717
	<u>1,040,935</u>	<u>812,224</u>
<b>Long-term liabilities</b>		
Fellowship prizes payable (note 6(a))	475,000	300,000
Scholarships payable (note 6(b))	1,300,000	672,000
	<u>1,775,000</u>	<u>972,000</u>
	<u>2,815,935</u>	<u>1,784,224</u>
<b>Net Assets</b>		
Net assets restricted for endowment purposes (note 7)	125,000,000	125,000,000
Net assets invested in property and equipment	357,356	411,437
Internally restricted net assets (note 8)	3,750,000	1,875,000
Unrestricted net assets (note 9)	4,243,630	3,155,499
	<u>133,350,986</u>	<u>130,441,936</u>
	<u>136,166,921</u>	<u>132,226,160</u>

Approved by the Board of Directors

\_\_\_\_\_  
Director

\_\_\_\_\_  
Director

**La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation**

Statement of Changes in Net Assets  
For the year ended August 31, 2004

	2004				2003	
	Restricted for endowment purposes \$	Invested in property and equipment \$	Internally restricted \$	Unrestricted \$	Total \$	Total \$
<b>Balance – Beginning of year</b>	125,000,000	411,437	1,875,000	3,155,499	130,441,936	126,584,789
Excess of revenues over expenses for the year	-	(82,720)	-	2,991,770	2,909,050	3,857,147
Internally imposed restriction	-	-	1,875,000	(1,875,000)	-	-
Investment in property and equipment	-	28,639	-	(28,639)	-	-
<b>Balance – End of year</b>	<u>125,000,000</u>	<u>357,356</u>	<u>3,750,000</u>	<u>4,243,630</u>	<u>133,350,986</u>	<u>130,441,936</u>

**La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation**

Statement of Revenues and Expenses  
For the year ended August 31, 2004

	2004 \$	2003 \$
<b>Revenues</b>		
Interest (net of investment counsel fees of \$352,148; 2003 – \$345,651)	5,551,263	5,212,085
Gain on disposal of fixed income securities	785,917	1,521,133
Donations	154,188	-
Other revenues	1,183	-
	<u>6,492,551</u>	<u>6,733,218</u>
<b>Expenses</b>		
AIPE program	451,106	125,415
Scholarship program	1,196,133	1,255,423
Mentorship program	129,639	-
Fellowship program	757,467	600,000
Planning and administration (schedule)	577,420	426,197
Program delivery (schedule)	471,736	469,036
	<u>3,583,501</u>	<u>2,876,071</u>
<b>Excess of revenues over expenses for the year</b>	<u>2,909,050</u>	<u>3,857,147</u>

**La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation**

Statement of Cash Flows  
For the year ended August 31, 2004

	2004 \$	2003 \$
<b>Cash flows from</b>		
<b>Operating activities</b>		
Excess of revenues over expenses for the year	2,909,050	3,857,147
Items not affecting cash and cash equivalents		
Gain on disposal of fixed income securities	(785,917)	(1,521,133)
Amortization of premium on fixed income securities	528,085	570,152
Amortization of property and equipment	82,720	41,756
Amortization of Web site development costs	39,264	30,497
	<u>2,773,202</u>	<u>2,978,419</u>
Changes in non-cash working capital components		
Decrease (increase) in		
Interest receivable	27,104	(637,243)
Other receivables	8,779	(86,990)
Increase (decrease)		
Accounts payable and accrued liabilities	(50,278)	55,572
Fellowship prizes payable	425,000	500,000
Scholarships payable	656,989	1,126,717
	<u>1,067,594</u>	<u>958,056</u>
	<u>3,840,796</u>	<u>3,936,475</u>
<b>Investing activities</b>		
Purchase of property and equipment	(28,639)	(453,193)
Deferred Web site development costs	(26,298)	(56,992)
Purchase of short-term investments	(634,390,190)	(894,923,066)
Proceeds on disposal of short-term investments	638,620,085	956,967,272
Purchase of fixed income securities	(143,334,172)	(150,569,613)
Proceeds on disposal of fixed income securities	129,865,222	89,936,239
	<u>(9,293,992)</u>	<u>900,647</u>
<b>Increase (decrease) in cash</b>	<u>(5,453,196)</u>	<u>4,837,122</u>
<b>Cash – Beginning of year</b>	<u>5,600,250</u>	<u>763,128</u>
<b>Cash – End of year</b>	<u>147,054</u>	<u>5,600,250</u>

# La Fondation Pierre Elliott Trudeau/ The Pierre Elliott Trudeau Foundation

Notes to Financial Statements  
August 31, 2004

## 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. The Foundation was created to honour the memory of the late prime minister, Pierre Elliott Trudeau. Its purpose is to promote outstanding research in the social sciences and humanities, and to foster a fruitful dialogue between scholars and policy-makers in government, business, the voluntary sector, the professions, and the arts community. In particular, the Foundation awards scholarships to the most talented doctoral students in Canada and abroad, awards prizes to Fellows of the highest distinction, and appoints Mentors to assist in the career development of Trudeau Scholars. The Academic Interchange and Public Engagement ("AIPE") program is the vehicle by which the Foundation seeks to promote enhanced discourse on major issues of public policy amongst policy-interested people, the Foundation's awardees, and a wider informed public. The network of Scholars, Fellows and Mentors is built and supported by the AIPE program, which links the awardees through the holding of workshops and seminars, and through the Foundation's members-only website.

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

## 2 Significant accounting policies

### 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 reporting period. Actual results could differ from those estimates.

### Cash

Cash consists of deposits with major financial institutions and balances with investment brokers.

### Revenue recognition

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 receivable if the amount to be received can be reasonably estimated and collection is reasonably assured.

Unrestricted investment income is recognized as revenue when earned.

(1)

# La Fondation Pierre Elliott Trudeau/ The Pierre Elliott Trudeau Foundation

Notes to Financial Statements  
August 31, 2004

## Premiums and discounts on fixed income securities

Premiums and/or discounts on fixed income securities are amortized on a straight-line basis to maturity.

## 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 reportability and 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%
Computer software	20%

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

## Deferred Web site development costs

Incremental costs directly related to the development of the Web site and placing it into service are deferred when it is probable that they will have a future benefit. Such costs are charged to earnings 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 earnings during the period.

These costs are expenses to the AIPE program, 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.

## 3 Short-term investments

Short-term investments include Canadian dollar denominated deposits and Treasury bills recorded at the lower of cost and market value. These investments bear interest at a floating rate and mature no later than August 31, 2005.

(2)

**La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation**

Notes to Financial Statements  
August 31, 2004

**4 Fixed income securities**

Fixed income securities are recorded at their unamortized cost net of the provision for losses, if necessary. They consist of Canadian government and corporate bonds. The Foundation's fixed income investments are exclusively in bonds rated no lower than "A" by at least one recognized credit rating agency.

Allocation of investments in fixed income securities by maturity date

Maturity	As at August 31, 2004			Total \$
	Less than 1 year \$	1 to 5 years \$	More than 5 years \$	
Unamortized cost	15,043,354	65,316,393	52,193,399	132,553,146
Par value	15,000,000	66,271,144	48,932,808	130,203,952
Average rate	4.56%	4.78%	5.41%	

**5 Property and equipment**

	2004			2003
	Cost \$	Accumulated amortization \$	Net \$	Net \$
Office communication equipment	12,665	3,546	9,119	11,399
Furnitures and fixtures	68,650	18,532	50,118	58,333
Computer equipment	52,137	17,015	35,122	40,205
Computer software	37,429	10,391	27,038	33,238
Leasehold improvements	310,951	74,992	235,959	268,262
	481,832	124,476	357,356	411,437

(3)

**La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation**

Notes to Financial Statements  
August 31, 2004

**6 Long-term liabilities**

a) Fellowship prizes payable

	2004 \$	2003 \$
Current portion of fellowship prizes payable	450,000	200,000
Long-term portion of fellowship prizes payable in years ending August 31, 2005	-	200,000
2006	350,000	100,000
2007	125,000	-
	475,000	300,000
	925,000	500,000

b) Scholarships payable

	2004 \$	2003 \$
Current portion of scholarships payable	483,706	454,717
Long-term portion of scholarships payable in years ending August 31, 2005	-	420,000
2006	817,000	252,000
2007	469,000	-
2008	14,000	-
	1,300,000	672,000
	1,783,706	1,126,717

**7 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". As per the agreement, the endowment is non-interest bearing 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.

(4)

**La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation**

Notes to Financial Statements  
August 31, 2004

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.

**8 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 must be internally restricted to ensure the protection of the endowment. Internally restricted assets are capitalized following the policies indicated in note 4.

**9 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.

**10 Interest rate risk**

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

Cash		Floating rate
Short-term investments		Floating rate
Investment in fixed income securities	Fixed rates ranging from 3.00% to 8.15%	
Interest and other receivables and all liabilities		Non-interest bearing

**11 Credit risk**

The Foundation invests in short-term and fixed income securities according to established policies in securities of major government and corporate fixed income instruments. The Investment Committee monitors these investments for credit risk. Management believes that there is no significant credit risk as at August 31, 2004.

(5)

**La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation**

Notes to Financial Statements  
August 31, 2004

**12 Commitments**

- a) In 2004, the Foundation has awarded seven mentors (of which one is unfunded), five fellows and 14 scholars. In 2003, the Foundation awarded four fellows and 12 scholars. The maximum amounts committed with respect to travel and meetings are as follows:

	\$
Years ending August 31, 2005	444,100
2006	615,000
2007	350,000

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

	\$
Years ending August 31, 2005	129,015
2006	129,015
2007	129,015
2008	75,259

**13 Employee pension plan**

The Foundation has a Quebec Simplified Pension Plan with defined contributions. The Foundation's contribution equals 3% of the employee's annual wage.

The total expense for the Foundation's defined contribution for the year ended August 31, 2004 was \$24,828 (2003 – \$3,062).

**14 Comparative figures**

Certain comparative figures have been reclassified to conform with the presentation adopted for the current year.

(6)

**La Fondation Pierre Elliott Trudeau/  
The Pierre Elliott Trudeau Foundation**

Schedule of Expenses

For the year ended August 31, 2004

---

	2004	2003
	\$	\$
<b>Planning and administration</b>		
Salaries and benefits	154,997	88,920
Rent and occupancy	141,268	85,507
Professional fees	83,403	145,700
Travel and meetings	40,966	19,943
Other employee expenses	14,643	5,245
Office expenses	58,868	38,840
Bank charges	555	286
Amortization of property and equipment	82,720	41,756
	<hr/> 577,420	<hr/> 426,197
<b>Program delivery</b>		
Salaries and benefits	419,521	349,112
Professional fees	38,530	21,010
Outreach and communications	13,685	98,914
	<hr/> 471,736	<hr/> 469,036