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The Pierre Elliott Trudeau Foundation
Annual Report
2008-2009



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ACHIEVEMENTS IN 2008-2009

Our distinctive and essential 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.

The Foundation successfully delivered on all commitments made in its Business Plan 2008-2009.

**KNOWLEDGE
ACQUISITION**

**KNOWLEDGE
TRANSFER**

**KNOWLEDGE
EXCHANGE**

FIFTEEN NEW 2009 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. The Foundation currently funds 62 Scholars.

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FIVE 2009 TRUDEAU
FELLOWS,
INCLUDING A FIRST
INTERNATIONAL VISITING
TRUDEAU FELLOW

An investment of \$1.1 million over three years in four Canadian intellectuals and one researcher from abroad who have set themselves apart through their research achievements, creativity and social commitment. The Foundation currently supports fifteen Fellows.

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TEN 2009 TRUDEAU MENTORS

Offering \$350,000 to ten highly accomplished Canadians from diverse backgrounds who have been paired with 2007 Trudeau Scholars to help them connect with policy networks. Nineteen Mentors are currently enrolled in the Mentoring program for 18-month mandates.

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**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, that have attracted more than 1,500 participants.

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IN ADDITION...

WE CONTINUED DISCUSSIONS WITH CANADIAN INSTITUTIONS, UNIVERSITIES AND THE BUSINESS COMMUNITY

to assess the potential of targeted fundraising efforts.

WE FOCUSED EVEN MORE DIRECTLY ON KNOWLEDGE DISSEMINATION ACTIVITIES,

notably by initiating the creation of an alumni association and by launching the Trudeau Lectures series to communicate our Fellows' knowledge to a wide audience.

WE DEDICATED MORE RESOURCES TO OUR INTERNATIONAL OUTREACH

For instance, we launched the first Visiting Trudeau Fellowship, enabling a leading intellectual to do research and teaching in Canada and we joined the UN Alliance of Civilizations Network of Foundations.

WE IMPROVED TRACEABILITY OF THE FOUNDATION'S SPENDING,

particularly through developing a new management framework for the Fellowship with universities.

WE PROCEEDED WITH A FIRST THOROUGH FIVE-YEAR REVIEW

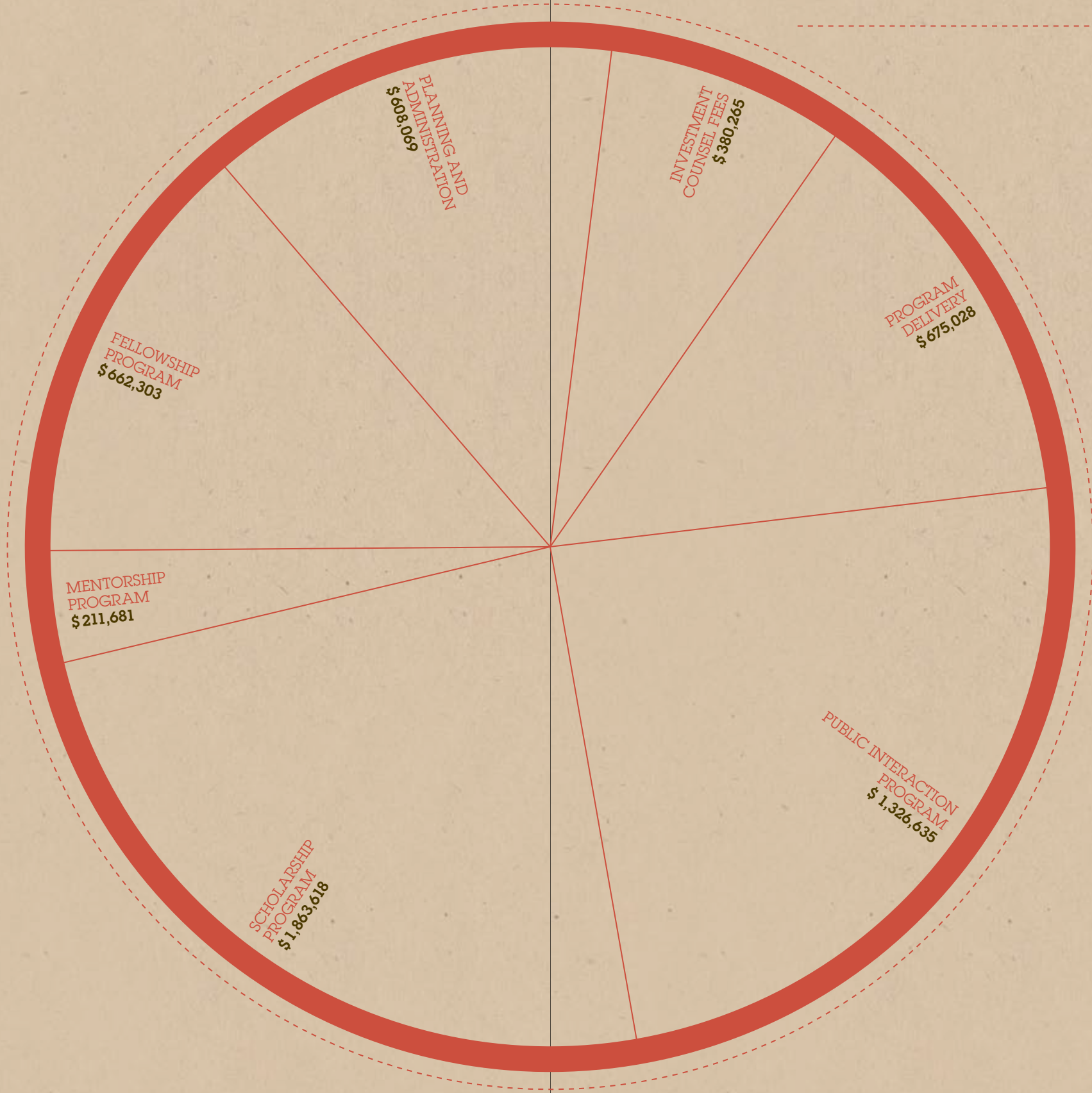
of the Foundation's programs and activities conducted by a three-member external Distinguished Review Panel, whose conclusions were overwhelmingly positive.

INVESTMENTS (MARKET VALUE) AT AUGUST 31, 2009

In spite of the grim financial and economical situation, the investment holdings surpassed \$150 million in 2009, thanks to diligent management by the Foundation's executive.



2009 EXPENSES
83% OF OUR EXPENSES
ARE ALLOCATED
TO PROGRAMS.



19	Our Mission
19	Our Themes
20	Message from the Chair
21	Message from the President
22	The Trudeau Scholarship
24	2009 Scholars
28	The Trudeau Fellowship
30	2009 Fellows
32	The Trudeau Mentorship
34	2009 Mentors
36	The Public Interaction Program
38	2008-2009 Events Hosted by the Foundation
42	2008-2009 Events Supported by the Foundation
43	Board of Directors
44	Members of the Corporation
45	Friends of the Foundation
46	Staff
47	Plans for 2009-2010

49	Financial Statements
----	----------------------



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. THE FOUNDATION SUPPORTS OUTSTANDING CREATIVE THINKERS WHO MAKE MEANINGFUL CONTRIBUTIONS TO CRITICAL SOCIAL ISSUES THROUGH SCHOLARSHIPS, FELLOWSHIPS, MENTORSHIPS AND PUBLIC INTERACTION EVENTS. TO DATE, THE FOUNDATION HAS GRANTED HUNDREDS OF MAJOR AWARDS TO TOP RESEARCHERS AND HIGHLY ACCOMPLISHED INDIVIDUALS, IN CANADA AND ABROAD. IN 2002, THE GOVERNMENT OF CANADA ENDOWED THE FOUNDATION WITH A DONATION OF \$125 MILLION FOLLOWING A UNANIMOUS VOTE OF THE HOUSE OF COMMONS. 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 and essential 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 to Canadians:

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

MESSAGE FROM THE CHAIR

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



A Significant and Sustained Progress

How well is the Foundation doing? Are our programs relevant? To what extent have we achieved our target impact? These typical governance concerns were on the minds of everyone in and around the Foundation this year as we embarked in our first comprehensive periodic evaluation. As a relatively young organization, the Foundation benefits from periodic evaluations by experienced, professional and thoughtful individuals who are thorough in their process and generous with their insight.

The heavy task of addressing the tough questions was taken up by a distinguished review panel comprised of Canadians who have made exceptional contributions to advanced research and public policy at a senior executive level: William C. Leggett, Chair of the Board of the Canada Foundation for Innovation and Principal Emeritus of Queen's University, Elizabeth Dowdeswell, whose public service career has spanned provincial, federal and international borders, focusing on engaging the public in public policy-making, and Gilles G. Patry, former President and Vice-Chancellor of the University of Ottawa and a member of the board of the Ontario Centres of Excellence.

Given their combined energy, professionalism, and leadership track record, it should come as no surprise that the Panel's review process was thorough and thought-provoking, engaging members of the Trudeau community at many levels. The interaction has provided a welcome challenge and resulted in forceful recommendations designed to ensure a robust and relevant future for the Foundation.

We are also gratified by the Panel's conclusion that the Foundation has "made significant and sustained progress toward achieving its remarkable vision." The dedication and commitment of many individuals and organizations contributed to their assessment that the Foundation is exceptional, unique and a "powerful vehicle for ensuring that Canada possesses the finest and most attuned thinking available in the broad areas of the humanities and social sciences." All the members of the Trudeau community – past and current Scholars, Fellows and Mentors, Foundation Members and Directors, staff, volunteers and friends – are to be commended for constantly demonstrating genuine commitment to the Foundation's mission and actively participating in our activities.

The Panel's stated expectations are both inspirational and humbling, as they foresee a short horizon before the Foundation becomes a major and leading force, enabling our best scholars and thinkers to make significant contributions to the future of Canada and the world.

MESSAGE FROM THE PRESIDENT

Pierre-Gerlier Forest, Ph.D., FCAHS
President



Photo: Jean-Marc Carisse / Ottawa

The Age of Reason

Now in its eighth year, our Foundation is moving into a new stage in its development – one that I think of as its "Age of Reason." Our interdisciplinary, intergenerational and international network of scholars are asking critical questions and building new knowledge networks that offer both significant challenges and substantive resources to public policy makers.

Pierre Elliott Trudeau embodied the passion, zeal and commitment that drive any major influence on politics and policy. But he also famously held that "Reason is mind. It is guidance and light. We should call it lucidity." The hallmarks of lucidity – clarity of vision, the rigorous pursuit of understanding and clear communication – are essential attributes of the Foundation's growing roster of activities. Every year, the Trudeau Foundation community grows to include recently appointed Scholars, Fellows and Mentors, and each individual brings new energy, hard questions and an original perspective to our collective pursuit of sound and innovative public policy propositions, guided by reason.

At this year's Summer Institute, we considered the aspiration of integrating rationality into our public policies, the complex factors that contribute to the behaviours of policy makers and the subsequent behaviours of the public. Rational public policies anticipate the complex factors that influence collective and individual human choices – elements we can only understand with new insights from our scientists, historians, and students of human behaviour. We live in an age when science – whether physical science or social science – must hold itself to the highest standards, and declare itself to be open to scrutiny

and challenge, dedicated to truthfulness and rigour, and passionate in its commitment to elucidating the critical questions of our times.

I continue to be honoured by the opportunity to carry this message on behalf of the Trudeau community, whose extraordinary contributions to society have helped the Foundation to earn the reputation it has achieved.

THE TRUDEAU SCHOLARSHIP

REASON AS A MEANS TO AN END

Trudeau Scholars are committed intellectuals at the vanguard of their respective fields of study who will become leading figures in academia and various public organizations. Their impact is already being felt through the diverse and original ideas they are contributing to the resolution of crucial contemporary problems. The research projects of the following three 2008 Scholars are telling examples of the depth and innovative nature of their work.

Jonathan Beauchamp's expertise is at the crossroad of mathematics, economics and social sciences. His work in behavioural economics provides a constructive critique of the ubiquitous rational agent model. According to him, "the shortcomings of the model are well documented but its simplicity is a key advantage and it allows for the development of more complex models; so the challenge is to find ways to make it more efficient in order for it to continue to be a useful tool for research."

Andrée Boisselle's research, which seeks to create a dialogue between Western legal traditions and the Stó:lō First Nation conception of law, highlights the rigidity of our culture, which tends to deny the existence of other rational systems. "In Law, the expression *Dura lex, sed lex* (the law is hard but it's the law) is sometimes invoked to justify the blind acceptance of our ways of doing and perceiving things." In her view, it is crucial to learn more about the different rational conceptions in order to be able to better understand, translate and disseminate knowledge beyond cultural divides.

Theology is one of the areas where reason may at first seem uncertain, or even absent. "Quite the contrary," retorts Xavier Gravend-Tirole, for whom religion and reason are not contradictory, especially when the aim is to avoid obscurantism. "Theologians have to dare to question dogmas to avoid being blinded by them." His study of creolization and contemporary religious recompositions would be unthinkable without the contribution of rational thinking as a tool to analyze religious phenomena. Nevertheless, it is important to be careful, he says, "because rationality itself can sometimes be set up as a religion."

ALL THE RIGHT REASONS

Up to fifteen scholarships are awarded each year to support doctoral candidates pursuing research into compelling present-day concern 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.

- 185 nominations were examined in the 2009 selection process
- The 2009 call for nominations opened in October 2008 and closed in January 2009
- 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 2009
- Scholars were announced by press release on May 20, 2009
- 2009 Scholarships started on September 1, 2009
- The annual value is up to \$60,000 per Scholar (including an annual travel allowance of \$20,000) for up to four years

“THE TRUDEAU DOCTORAL SCHOLARSHIP PROGRAM IS NOT JUST ANOTHER SCHOLARSHIP PROGRAM. IN FACT, THE PROGRAM IS UNIQUE IN MANY WAYS: BY VIRTUE OF THE GENEROSITY OF THE FINANCIAL AWARD, BY VIRTUE OF THE UNIQUE INTERACTION BETWEEN SCHOLARS AND MENTORS, AND IN THE NETWORKING OPPORTUNITY IT PROVIDES TO ALL MEMBERS OF THE TRUDEAU FOUNDATION COMMUNITY.”

- Report of the Distinguished Review Panel, March 2009

2009 SCHOLARS

MARTINE AUGUST

Planning, University of Toronto

Martine researches gentrification, affordable shelter, and other implications of recent approaches to replace public housing in Toronto.



JONAS-SÉBASTIEN BEAUDRY

Law, University of Oxford

Jonas-Sébastien is examining social exclusion in Latin America with a view to promote equality and better integration of various social groups.



MAGALY BRODEUR

Public Policy Analysis and Management,
École nationale d'administration publique

Magaly studies the social responsibility of the Quebec lottery board and other stakeholders in the prevention of pathological gambling among the elderly.



KATHRYN CHAN

Law, University of Oxford

Kathryn is looking into ways to modernize the law to better support or regulate volunteer and not-for-profit organizations in Canada.



ISABELLE CHOUINARD

Health Services Research, University of Calgary

Isabelle is consulting with various healthcare professionals to develop a framework for more ethical care.



SIMON COLLARD-WEXLER

Political Science, Columbia University

Simon is focusing on arms control agreements and violations, and on how Canada can help develop more effective policies.

CHRISTOPHER COX

Linguistics, University of Alberta

Christopher is working on an approach to document endangered languages, especially Plautdietsch, the traditional language of the Mennonites, which is still spoken in some communities in Canada.

TAMIL KENDALL

Interdisciplinary, University of British Columbia, Okanagan Campus

Tamil is exploring how to improve the prevention of mother-to-child HIV in Mexico.

JEAN-MICHEL LANDRY

Anthropology, University of California, Berkeley

Jean-Michel is studying Christian fundamentalism in the United States, and especially how some forms of exclusion and intolerance take root in religious experience.

LAURA MADOKORO

History, University of British Columbia

Laura is exploring the shifting conceptions and politics that govern aid and assistance to refugees in Canada and abroad.

LINDSEY RICHARDSON

Sociology, University of Oxford

Lindsey is studying the impact of employment on injection drug users' well-being, social inclusion and health.



MARK LAWRENCE SANTIAGO

Human Geography, University of British Columbia

Lawrence aims to help improve policies related to the ethical and sustainable recruitment of Filipino health workers in Canada.



JEREMY SCHMIDT

Geography, University of Western Ontario

Jeremy is focused on the ethical values of water users to inform an updated water policy in Alberta, in a context of potential water crisis.



LISA SZABO

English and Film Studies, University of Alberta

Lisa wants to use Canadian poetry to cultivate and sustain affiliation and care for the local environment.



DAVID THEODORE

Architecture and Urban Planning, Harvard University

David is studying the architecture of healthcare buildings as a form of medical technology that influences health care.



2008 SCHOLARS

Maria Banda, University of Oxford & Harvard University
Jonathan Beauchamp, Harvard University
Andrée Boisselle, University of Victoria
Julia Christensen, McGill University
Lisa Freeman, University of Toronto
Xavier Gravend-Tirole, University of Montreal & University of 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 Tayebwa, Concordia University
Christopher Tenove, University of British Columbia
Alberto Vergara Paniagua, University of Montreal
Lilia Yumagulova, University of British Columbia

2007 SCHOLARS

Alexander Aylett, University of British Columbia
Sherri Brown, Simon Fraser University
Elaine Craig, Dalhousie University
Lucas Crawford, University of Alberta
Jessica Dempsey, University of British Columbia
Sarah Kamal, 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, University of Montreal
Kate Parizeau, University of Toronto

2006 SCHOLARS

Michael Ananny, Stanford University
Catherine Bélair, Laval University
Christine Brabant, University of Sherbrooke
May Chazan, Carleton University
Rajdeep Singh Gill, University of British Columbia
Lisa Helps, University of Toronto
Kate Hennessy, University of British Columbia
Dawnis Kennedy, University of Toronto
Alexis Lapointe, University of Montreal and Paris X Nanterre
Jason Luckerhoff, University of Quebec at Trois-Rivières
Prateep Nayak, University of Manitoba
Taylor Owen, University of Oxford
Meredith Schwartz, Dalhousie University
Samuel Spiegel, University of Cambridge

2005 SCHOLARS

Astrid Christoffersen-Deb, University of Oxford
Sonali Thakkar, Columbia University

2004 SCHOLAR

Jillian Boyd, University of Toronto

FORMER SCHOLARS

Caroline Allard, University of Montreal (2003)
Anna-Liisa Aunio, McGill University (2003)
Jay Batongbacal, Dalhousie University (2003)
David R. Boyd, University of British Columbia (2005)
Marie-Joie Brady, University of Ottawa (2005)
Ken Caine, University of Alberta (2004)
Caroline Caron, Concordia University (2005)
Kevin Chan, Harvard University (2005)
Colleen M. Davison, University of Calgary (2004)
Nora Doerr-MacEwen, University of Waterloo (2004)
Lilith Finkler, Dalhousie University (2005)
Pascale Fournier, Harvard University (2003)
Julie Gagné, Laval University and École des hautes études en sciences sociales (2003)
Margarida Garcia, University of Quebec at Montreal (2004)
Ginger Gibson, University of British Columbia (2003)
Christian Girard, University of Montreal (2005)
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)
D. Meme Lavell-Harvard, University of Western Ontario (2003)
Robert Leckey, University of Toronto (2003)
David Mendelsohn, McGill University (2004)
James Milner, University of Oxford (2003)
Amy Z. Mundorff, Simon Fraser University (2005)
Robert Lee Nichols, University of Toronto (2003)
Alain-Désiré Nimubona, HEC Montréal (2004)
Rebecca Pollock, Trent University (2004)
Vincent Pouliot, University of Toronto (2005)
Karen Rideout, University of British Columbia (2004)
Louis-Joseph Saucier, University of Quebec at Montreal and Paris I Panthéon-Sorbonne (2004)
Alette Frank Sheinin, University of British Columbia (2005)
Anna Stanley, University of Guelph (2003)
Emma J. Stewart, University of Calgary (2005)
Sophie Thériault, Laval University (2003)
Pierre-Hugues Verdier, Harvard University (2006)
Grégoire Webber, University of Oxford (2004)

THE TRUDEAU FELLOWSHIP

CAREERS BUILT ON REASON

Trudeau Fellows are among the most eloquent bearers of “enlightened reason” which is at the heart of the Foundation’s mission. Accomplished researchers recognized by their peers, they embody knowledge in its most original and daring form. Their objective is no longer simply to come up with innovative solutions but also to find strategies that can be heard amid all the interference of disjointed information that bombards us these days.

Shana Poplack, 2007 Trudeau Fellow and world-renowned sociolinguist, works on everyday spoken language, often in bilingual and minority contexts. She fights against our tendency to dismiss vernacular expression as inferior to “the norm.” “These value judgments have had serious repercussions in terms of educational failure, employability, and unequal opportunity for their speakers,” she said at her Trudeau Lecture. On the basis of comprehensive field work and careful analysis of recorded conversations, she has been able to expose the so-called standard as idealized and arbitrary. As she points out, “When we actually deconstruct the prescriptive dictates that underlie the notion of the standard, we find far more heterogeneity, contradiction and confusion than in speech, even nonstandard.”

William D. Coleman, 2007 Trudeau Fellow, sought to shrug off the image of the inaccessible expert standing on higher ground by injecting a liberal dose of personal contextualization in his Trudeau Lecture. This strategy was appropriate in the context of his study of globalization and the human condition, an area where the individual can easily feel overwhelmed by forces operating light years away from the realities of everyday life. He described the key milestones of his own personal and academic journey, from his childhood to today. Weaving through his life in Penticton, Ottawa and Chicago, he showed how globalization is changing the way we live but notes that we have a role to play in this evolution: “The processes that together we call globalization today were started by us, by our leaders, our inventors, our creative thinkers, our transnational corporations, our governments. These processes did not just materialize out of thin air; human beings like you and me and institutions that we created made decisions that opened the door to globalization.”

REASON FOR PROGRESS

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 2009 call for nominations for the four regular Trudeau Fellowships opened in September and closed in November 2008
- The 2009 call for nominations for the first International Visiting Trudeau Fellowship opened in October and closed in December 2008
- Nominations were submitted by a list of 250 eminent nominators
- 58 nominations of Canadian candidates were examined in the Trudeau Fellowships selection process
- 4 nominations from Canadian universities were examined in the International Visiting Trudeau Fellowships selection process
- The Fellows were selected by an external committee of peers
- 5 Fellows were appointed in 2009
- Four Fellows were announced in a press release on May 13, 2009, and the Visiting Fellow was announced on September 13
- Their mandate began in June 2009 and will end in May 2012
- Overall value per Fellow: \$225,000 over three years

“THE KEY FEATURE OF THE TRUDEAU FOUNDATION COMMUNITY IS THE OPPORTUNITY IT AFFORDS TO FELLOWS TO INTERACT WITH AND MENTOR YOUNG SCHOLARS.”

- Report of the Distinguished Review Panel, March 2009

2009 FELLOWS

ISABELLA C. BAKKER

Professor, Department of Political Science, York University

A global intellectual leader, superb teacher and role model dedicated to enriching the lives of women around the world. Her work demonstrating the role of women in the economy shows a persistent engagement at the highest level of policy research.



CLARE BRADFORD

Visiting Trudeau Fellow

Professor, School of Communication and Creative Arts, Deakin University, Australia
Visiting Professor of Literary Studies, The University of Winnipeg

Her innovative research examines the interplay between children's literature and social practices, and particularly representations of Indigenous peoples and cultures in children's books.



BEVERLEY DIAMOND

Professor, Department of Music, Memorial University of Newfoundland

An exceptional leader in conserving and promoting Aboriginal and Canadian traditional music and exploring contemporary media, she is recognized for her creative approach, bringing the study and practice of music to a new level.



SIMON HAREL

Professor, Department of Literary Studies, Université du Québec à Montréal

A thought-provoking pioneer working to build an account of literature influenced and inspired by migration. He explores ethnic and cultural diversity in our societies, contributing significantly to academic milieus and the broader public.

Photo: Nathalie St-Pierre



JEREMY WEBBER

Professor, Department of Law, University of Victoria

An outstanding teacher and expert in Canadian constitutional politics, with a focus on Aboriginal rights. Webber is a brilliant communicator who applies his international experience to Canadian reality and explains Canada to international audiences.



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

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, Laval University
Barbara Neis, Memorial University
Jennifer Welsh, University of Oxford

2005 FELLOWS

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

2004 FELLOWS

Ann Dale, Royal Roads University
Roderick A. Macdonald, McGill University
Rohinton Mistry, Writer
Donald Savoie, University of Moncton
Daniel Weinstock, University of Montreal

2003 FELLOWS

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

THE TRUDEAU MENTORSHIP

FOR PRACTICAL REASONS

Mentors are trusted counsellors and friends who act as an invisible thread that strengthens the Trudeau community. Their presence is crucial to the vitality of the “intellectual ecosystem” fostered by the Foundation. One good example of the multi-faceted role of Trudeau Mentors is the involvement of a few of them in a workshop organized in November 2008 by Trudeau Scholars Taylor Owen (2006) and Emily Paddon (2007) entitled “Coordination and Collaboration in Peace Operations: Assessing Canada’s Integrated Approach in Afghanistan.”

The tone was set from the start by the opening presentation made by Carolyn McAskie, 2009 Trudeau Mentor, who drew on her impressive track record at the United Nations in various humanitarian, emergency relief, peacekeeping and peacebuilding appointments to offer an in-depth background perspective on the concept of integrated peace operations. She framed the concept of peacebuilding as (1) distinct from peacemaking by its overarching and all-integrating nature, (2) closely linked to the evolution of peacekeeping, and (3) anchored in the volatile period following the end of an armed conflict. Her recent tenure at the UN Peacebuilding Commission allowed her to bring to the discussion an informed and rational analysis based on lessons learned from real-life situations, successful (Burundi, Sierra Leone) and otherwise (Afghanistan, Democratic Republic of Congo).

Behind the scenes, the contributions of seasoned advisor such as Robert Fowler and Larry Murray, both 2008 Trudeau Mentors, also played an instrumental role in making the event a success. The sheer weight of their combined professional experience made them invaluable resources for the organizers, allowing them to identify the right participants and collaborators but also serving as a sounding board to frame the issues to be addressed. Moreover, access to their vast networks of contacts helped raise awareness about the event, which is still having echoes today through the launch of an online forum to keep the conversation about this important topic alive.

All Trudeau community members benefit from the Mentors’ practical advice on how to integrate a public policy perspective into research and how to communicate the results to audiences other than their immediate colleagues.

REASON COMMUNICATED

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 Trudeau Scholars to their networks.

- The 2009 call for nominations opened in July and closed in September 2008
- Nominations were submitted by a list of over 275 eminent nominators
- 163 nominations were examined in the 2009 selection process
- The Mentors were selected by an external committee of peers
- 10 Mentors were appointed in 2009
- The Mentors were announced in a press release on January 21, 2009
- Their mandate began in January 2009 and will end in June 2010
- Each Mentor may receive a \$20,000 honorarium and a \$15,000 travel allowance

“THE TRUDEAU MENTORS PROGRAM IS UNIQUE IN MANY WAYS: THE PRIVILEGE IT AFFORDS TO INTERACT WITH AND TO ENHANCE THE LEARNING AND PROFESSIONAL EXPERIENCE OF MANY OF THE MOST PROMISING CANADIAN SCHOLARS; THE NETWORK OPPORTUNITIES OFFERED TO MENTORS (...) THE FINANCIAL SUPPORT PROVIDED TO THE MENTORS TO ASSIST THEIR ACTIVE PARTICIPATION IN AND CONTRIBUTION TO THE PROGRAMS AND GOALS OF THE FOUNDATION.”

- Report of the Distinguished Review Panel, March 2009

2009 MENTORS

JAMES BARTLEMAN

Chancellor, Ontario College of Art and Design, and former Lieutenant Governor of Ontario

A champion of Aboriginal youth and literacy programs.

Photo: CNW Group / Ontario College of Art & Design



CHUCK BLYTH

Superintendent, Nahanni National Park Reserve, Northwest Territories

An accomplished northern artist, ecologist, and engaged volunteer.



RENÉE DUPUIS

Lawyer, writer, and Chief Commissioner of the Indian Claims Commission

A seasoned mediator active in various commissions on Aboriginal peoples.



IVAN FELLEGI

Chief Statistician Emeritus, Statistics Canada

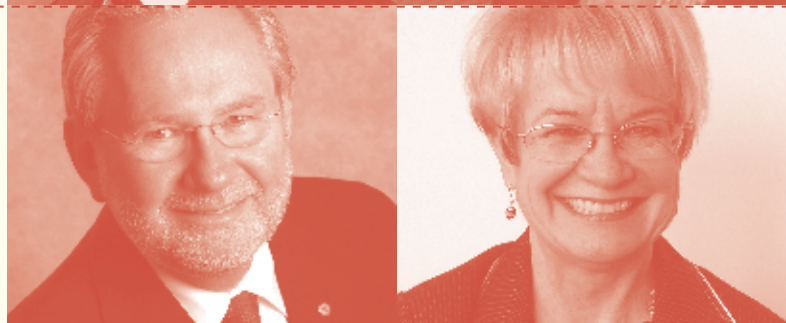
He was responsible for his organization's ranking as best statistical office in the world by *The Economist*.



PETER HARDER

Senior Policy Advisor, Fraser Milner Casgrain LLP, and former Deputy Minister Government of Canada

A public policy expert with three decades of government involvement.



MISEL JOE

Saquamaw and Administrative Chief, Mi'kmaq Grand Council

A spiritual leader in his community, committed to preserving the language, culture and traditions of his people.

CAROLYN McASKIE

Senior Fellow, Graduate School of Policy and International Affairs, University of Ottawa, and former Assistant Secretary General for Peacebuilding, United Nations

A specialist in international affairs in Canada and abroad.

ANNE McLELLAN

Counsel, Bennett Jones LLP, and former Deputy Prime Minister of Canada and Cabinet Minister

Bridges both the public policy and the business worlds.

ALANIS OBOMSAWIN

Documentary filmmaker and member of the Abenaki Nation

Dedicated to the well-being of her people and the preservation of First Nations heritage.

NOLA-KATE SEYMOAR

President and CEO, International Centre for Sustainable Cities

A proponent of urban, environmental and sustainability issues and planning.

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

REASON TO CONNECT

The 2009 Summer Institute focused on a straightforward question: What's reason got to do with public policy? Grégoire Webber, a former Trudeau Scholar (2004), made a strong statement about the important role played by rationality in public policy-making. So, what's reason got to do with it? "Everything," according to the young Senior Policy Advisor with the democratic reform unit of the Privy Council Office. Making room for a rational approach to policy-making means allowing time and resources to carefully analyze, discuss and reassess, if need be, decisions that, once passed through the cogs of legislation, will invariably have a significant impact on the lives of citizens.

A dialogue session between Will Kymlicka, 2005 Trudeau Fellow, and Arthur Sweetman, the Stauffer-Dunning Chair at the Queen's University School of Policy Studies, brought forward two interesting points. For the former, a rational approach is sometimes compromised by external factors that are more or less predictable: "Some fields of public policy are particularly prone to irrational policies because they generate 'moral panics' in the general population. Modest problems become inflated into a sense of 'crisis,' generating demands for an immediate, dramatic and typically harsh policy response." The latter noted that "when studying organizations, a key issue is to understand how presumably rational individuals' preferences are aggregated into a single final decision, or set of decisions." This can lead to results that may seem highly irrational from the perspective of a rational individual.

In his position paper written for the Institute, 2008 Trudeau Fellow John B. Robinson argued that "at least in matters related to sustainability, where the stakes and the urgency are both high, conventional approaches to informing public policy based on supplying decision-makers with scientifically based analysis (...) are insufficient." He pointed out the difficulty of connecting the needs and concerns of academic researchers with those of normal citizens and policy makers. Nonetheless, he is convinced of the need for an expanded concept of rationality: "The strong levels of user engagement required to address transformative change processes imply a concept of rationality that encompasses the preferences, values, beliefs and attitudes of stakeholders (...). This in turn implies a conceptualization of the public policy process that is open to such processes."

The depth of discussions and the diversity of perspectives at the event clearly illustrated the platform offered by the public interaction program for the exchange of knowledge and ideas.

REASONS TO LEARN

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 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 2008-2009: 14
- Total attendance at events this year: 1,500

“THE PUBLIC INTERACTION PROGRAM IS AN IMPORTANT COMPONENT OF THE TRUDEAU FOUNDATION PROGRAMS. FIRST, IT BRINGS TOGETHER MEMBERS OF THE TRUDEAU FOUNDATION PROGRAMS (...). SECOND, THE RESULTING INTERACTION BETWEEN SCHOLARS, MENTORS, FELLOWS, POLICY MAKERS AND IMPLEMENTERS, AND OTHER KEY STAKEHOLDERS IS AN EFFECTIVE WAY: A) TO FOSTER THE TRANSLATION OF POLICY RESEARCH INTO ACTION; B) TO ENGAGE THE PUBLIC ON ISSUES THAT ARE OF STRATEGIC IMPORTANCE TO CANADIANS; AND C) TO INCREASE VISIBILITY AND IMPACT OF THE FOUNDATION.”

- Report of the Distinguished Review Panel, March 2009

2008-2009 EVENTS HOSTED BY THE FOUNDATION

“GLOBALIZATION AND BRITISH COLUMBIA: A LONG HISTORY?”

Trudeau Lecture by Professor William D. Coleman (University of Waterloo),
2007 Trudeau Fellow
October 23, 2008 – Prince George, British Columbia

The first of five 2008-2009 Trudeau Lectures was held at the University of Northern British Columbia (UNBC). Speaking to a room filled with close to 100 engrossed staff and students, Trudeau Fellow William D. Coleman shared a personal view of the impact of globalization on B.C. in different fields, such as culture, the economy and Aboriginal peoples. The rich question and answer session that followed proved that his words raised intense interest. Professor Coleman's presence led to other opportunities, such as a local radio interview and a luncheon on globalization with a group of UNBC graduate students.



“HIGH PRINCIPLES AND EFFECTIVE PROPOSALS: REDEFINING CANADA'S GLOBAL AGENDA”

Trudeau Conference on Public Policy
November 13-15, 2008 – Montreal, Quebec

Our fifth annual conference on public policy attracted over 225 participants to discuss Canada's Global Agenda. Sixty-nine different organizations and universities from across the country and around the world were represented, and more than half of the participants were not previously related to the Trudeau community.



“THE POLITICS OF GLOBAL FINANCE: DOES MONEY MAKE THE WORLD GO 'ROUND?’”

Trudeau Lecture by Professor Eric Helleiner (University of Waterloo),
2007 Trudeau Fellow
November 19, 2008 – Lethbridge, Alberta

The second Trudeau Lecture continued the outstanding launch of this new lecture series. Ms. Annette Trimbee, Deputy Minister of Advanced Education and Technology, introduced the speaker. Speaking to an audience of 130 participants about the current global financial crisis, Professor Eric Helleiner stressed that political ideas are of central importance to global markets. Contradicting the saying that money makes the world go round, he painted a convincing picture of the historic and current dominance of politics and nation-states over financial markets. Helleiner's presence in Lethbridge was announced in the print and electronic media. On the same occasion, he also gave a lecture to more than 60 participants of the Southern Alberta Council on Public Affairs. The lively discussion was moderated by Raymond Speaker, a Trudeau Mentor.

MENTORS-SCHOLARS RETREAT

January 27-28, 2009 – St. John's, Newfoundland and Labrador

About 35 Scholars and 15 Mentors discussed practical applications of research in public policy. The new 2009 Mentors met with their Scholars for the first time, and discovered the interest of all Scholars in their work during four dialogue sessions tied to the four key themes of the Foundation. An opening lecture by Dr. Roy Culpeper, President and CEO of the North-South Institute, set the tone for the discussions, and a closing panel on Research, Policy and Social Action in Newfoundland brought together the Hon. John Crosbie, Chief Misesel Joe (2009 Mentor) and Memorial University Professor Stephen Bornstein.

“ARE HUMANS UNSUSTAINABLE BY NATURE?”

Trudeau Lecture by Professor William E. Rees
(The University of British Columbia), 2007 Trudeau Fellow
January 28, 2009 – St. John’s, Newfoundland and Labrador

Over 400 participants – including Lieutenant Governor John Crosbie – gathered at the Memorial University of Newfoundland to hear Professor Rees. Eighty more listened to his webcast lecture from the Sir Wilfred Grenfell College’s Environmental Policy Institute. He addressed the question “Are humans unsustainable by nature?” by presenting a wide array of scientific and historic developments. The local media followed his visit closely.



“WHAT’S REASON GOT TO DO WITH IT? RATIONALITY AND PUBLIC POLICIES”

May 18-22, 2009 – Gananoque, Ontario

The annual Trudeau Summer Institute offered an exceptional opportunity for collaboration and intense networking among Trudeau Scholars, Fellows and Mentors. It was also the ideal place to find out about research being carried out by Trudeau Foundation community members, to make contact with colleagues in preparation for Trudeau community events, or to learn more about other disciplines. The event was a resounding success, attracting more than 100 participants. Fellows, Mentors and Scholars actively participated in formal sessions and took advantage of informal discussions to exchange ideas and launch numerous projects for future partnerships and collaborations.

“WHAT LANGUAGE DO WE SPEAK?”

Trudeau Lecture by Professor Shana Poplack (University of Ottawa),
2007 Trudeau Fellow
February 24, 2009 – Moncton, New Brunswick

The University of Moncton’s Law auditorium was filled with a bilingual audience eager to listen to sociolinguist Shana Poplack, who asked “What language do we speak?” Professor Poplack questioned the idea of “good” or “bad” language, or standard language in favour of spoken language. Presenting research results achieved by her world-renowned Sociolinguistic Laboratory, she questioned the assumptions that grammar is a repository of the correct language and that standard language is a well-defined set of conventions, since prescriptions have little influence over spoken language. A luncheon with students and colleagues, and interviews with Radio-Canada and local media, rounded off her visit.



“IS CANADA A TRULY COSMOPOLITAN SOCIETY?”

Trudeau Lecture by Professor Joseph Yvon Thériault
(Université du Québec à Montréal), 2007 Trudeau Fellow
May 26, 2009 – Ottawa, Ontario

To conclude its first Trudeau Lectures series, the Foundation partnered with the Canadian Federation for the Humanities and Social Sciences to organize a fifth Trudeau Lecture at Carleton University. Professor Joseph Yvon Thériault presented his research work and personal reflections on Canada as a cosmopolitan society. The lecture was part of the formal program of the 2009 Congress of the Humanities and Social Sciences, which is the meeting place for around 10,000 leading public intellectuals, authors, artists, researchers, scholars and students in the humanities and social sciences.

2008-2009 EVENTS SUPPORTED BY THE FOUNDATION

“COORDINATION AND COLLABORATION IN PEACE OPERATIONS: ASSESSING CANADA’S INTEGRATED APPROACH IN AFGHANISTAN”

November 12-13, 2008 – Montreal, Quebec

Seminar organized by Trudeau Scholars Emily Paddon (2007) and Taylor Owen (2006), supported by the Foundation, Rights and Democracy, and the Liu Institute (The University of British Columbia).

“WHAT NEW CANADIAN LEADERSHIP? PERSPECTIVES ON THE PROMISES AND PROBLEMATICS OF CANADA’S ROLE IN A SOCIALLY JUST GLOBAL SOCIETY”

November 13, 2008 – Montreal, Quebec

Scholars’ Workshop organized by 2007 Trudeau Scholars Jason Morris-Jung and Jessica Dempsey.

“JACQUES HÉBERT – HIS LIFE AND WORK”

December 8, 2008 – Montreal, Quebec

The life and work of Jacques Hébert - a founding Member of the Foundation - were depicted at conference organized in collaboration with Canada World Youth. Canada World Youth presented the first Jacques-Hébert Global Citizenship Awards.

“THE UNIVERSAL DECLARATION OF HUMAN RIGHTS: 60 YEARS LATER”

December 9, 2008 – Montreal, Quebec

Conference to commemorate the 60th anniversary of the United Nations Universal Declaration of Human Rights organized in Partnership with the Association for Canadian Studies.

“WORKING IN AND WITH THE COMMUNITY”

January 27-29, 2009 – St. John’s, Newfoundland and Labrador

Workshop organized by 2006 Trudeau Fellow Barbara Neis and 2007 Trudeau Scholar Leah Levac.

“HUMANITIES, RESEARCH AND CREATIVITY”

May 19, 2009 – Gananoque, Ontario

A set of Scholars’ workshops initiated by 2006 Trudeau Scholars Christine Brabant, Meredith Schwartz and others to develop creativity through movement, filmmaking and creative writing. The workshops were hosted by 2008 Trudeau Fellows Rosemary Sullivan and Guy Vanderhaeghe, and 2009 Mentor Alanis Obomsawin.

ALUMNI ASSOCIATION

This year, a group of former Scholars, Fellows and Mentors decided to clean the path for the establishment of an Alumni Association. The goal of the Alumni Association is to foster long-term relationships with the Pierre Elliott Trudeau Foundation’s alumni for the vital support and development of the Foundation and its greater community.

Through the Alumni Association, the Foundation continues to build a vibrant community of creative and critical thinkers to share ideas that matter.

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 2008 AND APRIL 2009. 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 HIS STRATEGIC DECISIONS AND THE IMPLEMENTATION OF DILIGENT AND TRANSPARENT MANAGEMENT PRACTICES.

Roy L. Heenan,¹ 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, Torys 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, Former Ambassador of Canada to the Italian Republic

Chaviva Hošek,¹ 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, Former Rector, Université du Québec à Montréal

L. Jacques Ménard,³ Chairman, BMO Nesbitt Burns and President, BMO Financial Group, Quebec

Heather Munroe-Blum,³ Principal and Vice-Chancellor and senior officer of McGill University

Patrick Pichette,³ Senior Vice-President and Chief Financial Officer, Google Inc.

Marc Renaud, Professor, Université de Montréal, and former President,

Social Sciences and Humanities Research Council

Sean E. Riley, President, St. Francis Xavier University

Emőke J. E. Szathmáry,² President Emeritus, University of Manitoba

Alexandre Trudeau,¹ Documentary filmmaker

Milton K. Wong, Chairman, Perceptronix Medical Inc.

¹ Member of the Executive Committee

² Appointed in April 2009

³ Appointed in November 2009

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 MEET ONCE A YEAR AT THE ANNUAL MEETING OF THE MEMBERS WHERE THEY APPOINT EXTERNAL AUDITORS AND NEW DIRECTORS AND MEMBERS AS REQUIRED; APPLICATIONS ARE RECEIVED BY THE NOMINATING COMMITTEE.

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
Carolina Gallo-La Flèche,¹ Montreal, Quebec
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

¹ Until November 2009

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 ENSURE 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

The Estate of Vincent Borg
Ms. Caroline Caron
Dr. Lesley Cormack
Mr. Bob Hepburn
Mr. Claude Laverdure
Prof. Barbara Neis
and other anonymous donors

FILE REVIEW COMMITTEES

Chantal Blouin, Ottawa, Ontario
Douglas Brown, Antigonish, Nova Scotia
Duncan Cameron, Quebec City, Quebec (Chair of the Fellows' Review Panel)
Robert Campbell, Sackville, New Brunswick
Janice Charrette, Gatineau, Quebec
Lesley Cormack, Burnaby, British Columbia
Jack Davis, Bragg Creek, Alberta
André Émond, Sudbury, Ontario (Co-Chair of the Scholars' Review Panel)
Ian Green, Ottawa, Ontario
Agnès Gruda, Montreal, Quebec
Arthur J. Hanson, Victoria, British Columbia
Simon Harel, Montreal, Quebec
Bob Hepburn, Toronto, Ontario
Roderick A. Macdonald, Westmount, Quebec
Barbara Neis, St. John's, Newfoundland & Labrador (Chair of the Scholars' Review Panel)
Andrew Noseworthy, St. John's, Newfoundland & Labrador (Chair of the Mentors' Review Panel)
Dominique Payette, Quebec City, Quebec
Patricia Smart, Ottawa, Ontario
Jacinthe Tremblay, Montreal, Quebec
Grégoire Webber, Ottawa, Ontario

STAFF

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.

EVERY EFFORT IS MADE TO KEEP THE FOUNDATION'S OPERATING COSTS UNDER STRICT CONTROL. DURING THE 2008-2009 FISCAL YEAR, THE FOUNDATION HAD ONE PART-TIME AND SIX FULL-TIME STAFF MEMBERS TO RUN ITS AMBITIOUS PROGRAMS. TO LIMIT SALARY AND BENEFIT COSTS, SOME WORK, ESPECIALLY IN THE AREAS OF ACCOUNTING, COMMUNICATIONS AND INFORMATION SERVICES CONTINUE TO BE CONTRACTED OUT.

Bettina B. Cenerelli, Program Director — Fellowships, Mentorships and Public Interaction
Élise Comtois, Director of Corporate Services and Public Affairs
Norah Cyprien, Administrative Assistant
Pierre-Gerlier Forest, President
Stéphanie Forest, Executive Assistant
Michel Hardy-Vallée, Communications Officer (until January 2009)
Josée St-Martin, Program Director — Scholarships
François-Xavier Tremblay, Communications Officer (as of April 2009)

ADDITIONAL TEAM MEMBERS

Renée Fontaine, Intern, Program Support (summer 2009)
Guillaume Lavoie, Program Officer, Development and Partnerships (until November 2008)
Cassandra Porter, Research Assistant (until January 2009)

PLANS FOR 2009-2010

- WE INTEND TO APPOINT FIFTEEN SCHOLARS, FIVE FELLOWS – INCLUDING A FIRST NATIONAL VISITING TRUDEAU FELLOW – AND UP TO TWELVE MENTORS.
 - WE WILL ORGANIZE AND HOLD EIGHT TRUDEAU EVENTS AND SUPPORT AT LEAST TWO ADDITIONAL PIP EVENTS.
 - WE WILL ENGAGE IN A NEW STRATEGIC PLANNING EXERCISE.
 - THE BOARD WILL ALSO LOOK AT PRIVATE FUNDRAISING, WITH THE OBJECTIVE OF DEVELOPING AND IMPLEMENTING A STRATEGY WITHIN THE NEXT TWO YEARS.
-

The Pierre Elliott Trudeau Foundation
Financial Statements
August 31, 2009



NOVEMBER 5, 2009

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** (the "Foundation") as at August 31, 2009 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, 2009 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*¹

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 and independent legal entity.

STATEMENT OF FINANCIAL POSITION
AS AT AUGUST 31, 2009

	2009	2008
	\$	\$
Assets		
Current assets		
Cash and cash equivalents	373,116	1,886,055
Short-term investments (note 5)	788,062	938,442
Marketable securities (note 6)	3,162,407	13,793,475
Interest receivable	1,683,313	1,938,699
Other receivables	97,403	163,407
	6,104,301	18,720,078
Marketable securities (note 6)	145,368,408	128,724,479
Property and equipment (note 7)	171,627	198,346
Deferred website development costs (accumulated amortization of \$174,074; 2008 – \$171,413)	5,322	-
	151,649,658	147,642,903
Liabilities		
Current liabilities		
Accounts payable and accrued liabilities	456,822	279,250
Deferred revenue (note 12)	-	46,153
Current portion of fellowship prizes payable (note 8(a))	597,514	608,279
Current portion of scholarships payable (note 8(b))	1,337,398	938,186
Mentorships payable	100,000	95,000
	2,491,734	1,966,868
Long-term liabilities		
Fellowship prizes payable (note 8(a))	402,105	466,810
Scholarships payable (note 8(b))	2,011,263	1,917,560
	2,413,368	2,384,370
	4,905,102	4,351,238
Net Assets		
Net assets restricted for endowment purposes (note 9)	125,000,000	125,000,000
Net assets invested in property and equipment	171,627	198,346
Internally restricted net assets (note 10)	13,125,000	11,250,000
Unrestricted net assets (note 11)	8,447,929	6,843,319
	146,744,556	143,291,665
	151,649,658	147,642,903

Approved by the Board of Directors

STATEMENT OF CHANGES IN NET ASSETS
FOR THE YEAR ENDED AUGUST 31, 2009

	2009				2008
	Restricted for endowment purposes	Invested in property and equipment	Internally restricted	Unrestricted	Total
	\$	\$	\$	\$	\$
Balance – Beginning of year	125,000,000	198,346	11,250,000	6,843,319	143,291,665
Change in accounting policy (note 2)	-	-	-	-	(1,092,341)
Excess (deficiency) of revenues over expenses for the year	-	(40,579)	-	3,493,470	3,452,891
Internally imposed restriction	-	-	1,875,000	(1,875,000)	-
Investment in property and equipment	-	13,860	-	(13,860)	-
Balance – End of year	125,000,000	171,627	13,125,000	8,447,929	146,744,556

STATEMENT OF REVENUES AND EXPENSES
FOR THE YEAR ENDED AUGUST 31, 2009

	2009	2008
	\$	\$
Revenues		
Interest	6,593,614	6,816,482
Gain on disposal of fixed income securities	212,250	805,015
Unrealized gain on marketable securities	2,322,724	3,640,079
Donations	51,902	1,600
	9,180,490	11,263,176
Expenses		
PIP	1,326,635	1,292,059
Scholarship program	1,863,618	1,897,656
Mentorship program	211,681	184,268
Fellowship program	662,303	773,175
Planning and administration (schedule of expenses)	608,069	675,514
Program delivery (schedule of expenses)	675,028	618,167
Investment counsel fees	380,265	361,074
	5,727,599	5,801,913
Excess of revenues over expenses for the year	3,452,891	5,461,263

STATEMENT OF CASH FLOWS
FOR THE YEAR ENDED AUGUST 31, 2009

	2009	2008
	\$	\$
Cash flows from		
Operating activities		
Excess of revenues over expenses for the year	3,452,891	5,461,263
Items not affecting cash and cash equivalents		
Gain on disposal of fixed income securities	(212,250)	(805,015)
Unrealized gain on marketable securities	(2,322,724)	(3,640,079)
Amortization of property and equipment	40,579	42,857
Amortization of website development costs	2,661	9,540
Unrealized gain on long-term liabilities and interest expense	(106,132)	(46,889)
	855,025	1,021,677
Changes in non-cash working capital components		
Decrease (increase) in		
Interest receivable	255,386	49,211
Other receivables	66,004	(66,299)
Increase (decrease) in		
Accounts payable and accrued liabilities	177,572	62,760
Deferred revenue	(46,153)	-
Scholarships and fellowship prizes payable	523,577	737,750
Mentorships payable	5,000	5,000
	981,386	788,422
	1,836,411	1,810,099
Investing activities		
Purchase of short-term investments	(115,696,086)	(125,651,518)
Proceeds on disposal of short-term investments	115,846,466	126,648,936
Purchase of fixed income securities	(86,195,392)	(38,882,776)
Proceeds on disposal of fixed income securities	82,717,505	37,747,167
Purchase of property and equipment	(13,860)	(2,882)
Deferred website development costs	(7,983)	-
	(3,349,350)	(141,073)
Net change in cash and cash equivalents during the year	(1,512,939)	1,669,026
Cash and cash equivalents – Beginning of year	1,886,055	217,029
Cash and cash equivalents – End of year	373,116	1,886,055

NOTES TO FINANCIAL STATEMENTS

AUGUST 31, 2009

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

a) For the year ended August 31, 2009

Effective September 1, 2008, the Foundation adopted the following two new accounting standards issued by the Canadian Institute of Chartered Accountants (“CICA”).

Section 1535, “Capital Disclosures”, establishes standards for disclosing information about an entity’s capital and how it is managed. It describes the disclosure of the entity’s objectives, policies and processes for managing capital, the quantitative data about what the entity regards as capital and whether the entity has complied with any capital requirements. Disclosure and presentation requirements pertaining to this section are contained in note 4.

Section 1400, “General Standards of Financial Statement Presentation”, was amended to include requirements to assess and disclose an entity’s ability to continue as a going concern. The Foundation’s disclosure reflects such assessment.

b) Effect of accounting pronouncements not yet effective

The Foundation has elected to continue to apply Section 3861, “Financial Instruments – Disclosure and Presentation”, as permitted for not-for-profit organizations under recently issued sections 3862 and 3863 on disclosures and presentation of financial instruments.

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.

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.

3 SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

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.

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%
Computer software	20%

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.

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.

3 SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

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

On September 1, 2008, the Foundation adopted the provisions of Section 1535, which establishes standards for disclosing qualitative and quantitative information about an entity's capital and how it is managed.

As at August 31, 2009, the Foundation's capital structure consists of a \$125 million endowment from the federal government, internally restricted funds of \$13,125,000 and unrestricted net assets of \$8,447,929.

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, 2010.

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:

	2009			Total
	Less than 1 year	1 to 5 years	More than 5 years	
	\$	\$	\$	\$
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%	

	2008			Total
	Less than 1 year	1 to 5 years	More than 5 years	
	\$	\$	\$	\$
Fair value	13,793,475	80,627,510	48,096,969	142,517,954
Par value	13,608,071	76,946,158	45,821,000	136,375,229
Weighted average yield	4.42%	4.86%	4.93%	

7 PROPERTY AND EQUIPMENT

	Cost	Accumulated amortization	2009	2008
			Net	Net
	\$	\$	\$	\$
Office communication equipment	16,239	11,656	4,583	5,729
Furniture and fixtures	84,665	59,344	25,321	29,644
Computer equipment	79,450	54,775	24,675	20,298
Computer software	49,565	34,341	15,224	17,650
Leasehold improvements	322,474	229,670	92,804	116,005
Artwork	9,020	-	9,020	9,020
	561,413	389,786	171,627	198,346

8 LONG-TERM LIABILITIES

a) Fellowship prizes payable

	2009	2008
	\$	\$
Current portion of fellowship prizes payable	597,514	608,279
Long-term portion of fellowship prizes payable in years ending August 31, 2010	-	352,811
2011	310,707	113,999
2012	91,398	-
	402,105	466,810
	999,619	1,075,089

b) Scholarships payable

	2009	2008
	\$	\$
Current portion of scholarships payable	1,337,398	938,186
Long-term portion of scholarships payable in years ending August 31, 2010	-	1,156,172
2011	967,496	761,388
2012	1,043,767	-
	2,011,263	1,917,560
	3,348,661	2,855,746

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

	2009	2008
	\$	\$
Scholarship program	88,449	131,511
Fellowship program	17,683	36,790
	106,132	168,301

9 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.

10 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.

11 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.

	2009	2008
	\$	\$
Cumulative growth of the Fund	8,067,820	6,503,514
Private Donations Fund	380,109	339,805
Total unrestricted net assets	8,447,929	6,843,319

12 DEFERRED REVENUE

In 2007, the Foundation received donations which were intended to subsidize a future initiative, the Trudeau Lectures. These donations were recorded as deferred revenue until the formal launch of the Lectures in fiscal 2009, at which time they were recognized in revenues as ordinary donations.

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, 2009.

15 COMMITMENTS

a) In fiscal 2009, the Foundation has awarded ten Mentors, five Fellows and fifteen Scholars. In fiscal 2008, the Foundation awarded nine Mentors, five Fellows and fifteen Scholars. The maximum amounts committed with respect to travel and meetings are as follows:

	\$
Years ending August 31, 2010	1,219,000
2011	881,400
2012	359,600

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

	\$
Years ending August 31, 2010	148,345
2011	147,417
2012	146,488
2013	99,665
2014	5,990

	2009	2008
	\$	\$
Planning and administration		
Salaries and benefits	119,690	121,322
Rent and occupancy	153,475	135,056
Professional fees	127,058	162,109
Access to Information Act and Privacy Act	9,726	45,522
Communications, meeting and travel	81,442	90,864
Other employee expenses	6,606	11,202
Office expenses	69,186	66,250
Amortization of property and equipment	40,579	42,857
Bank charges	307	332
	608,069	675,514
Program delivery		
Salaries and benefits	582,576	559,505
Professional fees	60,666	4,678
Outreach and communications	31,786	53,984
	675,028	618,167

