

**Trudeau Foundation Preliminary Programme Evaluation:
Management Response and Recommendations for Action**

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Introduction

The Report of the preliminary evaluation of the programmes of the Trudeau Foundation, conducted by Mr Phillip Rawkins, was received by the Board of Directors at its meeting of 10 November 2005. The Report is an internal document for the Board only. At the November meeting the Directors expressed overall satisfaction with the evaluation and asked the President of the Foundation to consult with staff in preparing a management response and recommendations for action. The general consensus of the programme staff, in which I fully share, is that the evaluation was thoroughly professional and that it has achieved the right balance in “acknowledging the many accomplishments of the Foundation, as well as the outstanding quality of its award-holders... [while offering] a reflection on what has been learned through three years of experience of the programme cycle, as well as of scholarly and public engagement. It also provides an opportunity for reconsideration of programme design issues, as well as of all facets of programme operations and management.”¹

The preliminary evaluation was based on an “evaluation framework” designed in consultation with a mixed internal-external Evaluation Steering Committee. The framework was required under the terms of our Funding Agreement with the Government of Canada (Funding Agreement), and was prepared by Mr Rawkins. The Funding Agreement also requires a full programme review to be completed by 31 March 2007, and every five years thereafter. The preliminary evaluation was intended to: (a) reveal any gaps in data gathering that would make evaluation less effective than we would wish; (b) identify issues that should be addressed in preparation for the full programme evaluation; (c) provide guidance as to suggested mid-course corrections to ensure that the programmes are as effective as possible. The 2007 evaluation will have to be sent to Industry Canada for review. It is likely to fall within the ambit of access to information legislation at the federal level.

It is worth emphasising that in the preliminary evaluation Report, Mr Rawkins was careful to establish realistic parameters for the evaluation of a Foundation only three years into its operations. He noted that “[a]t its meeting in October 2004, there was a consensus among members of the Evaluation Steering Committee that it should be recognized that for the Foundation to be seen to have broad “impact” in shaping public dialogue on critical issues, it may be unrealistic to make a rigorous assessment before ten or more years have elapsed. For the present, what is of greater concern is to make an appraisal of whether the Foundation, through its programmes, and through directions taken, is ‘*on track*’ to achieving its goals.”

I am confident that the preliminary evaluation reveals that the Pierre Elliott Trudeau Foundation is firmly “on track”. That being said, Mr Rawkins offered many helpful recommendations, most focussed upon the selection processes for Foundation award holders. In this response I will address each recommendation in turn, drawing together the reflections of the programme staff, and adding my own assessment. In some cases,

¹ Phillip Rawkins, PRELIMINARY REVIEW OF THE TRUDEAU FOUNDATION (2005) at 4.

we have already implemented the recommendation. In other cases, we plan to do so, and I will propose a specific timeframe for implementation. In a few cases, we are not convinced that we should act upon the recommendation, or we think that the suggested approach should be modified. I will offer full reasons on these points of disagreement.

Summary of Recommendations and Foundation Management Response with Action

The Scholarship Programme

1. It is recommended that the Foundation approach the Canadian Association for Graduate Studies (CAGS) with a view to requesting the opportunity to make a presentation on the Scholarship Programme and issues relating to the candidate pool.

-Accept. To do in 2006, before the next round of Scholarship applications. Note that CAGS has already helped the Foundation in circulating the launch information to university graduate studies faculties. The President consulted with the leadership of CAGS in the design of the Scholarship process in 2002. (Action: Scholarships Programme Officer to arrange meeting including Executive Director of Programmes).

2. It will be worthwhile for the Foundation to conduct some further investigations of barriers to participation of candidates from Humanities (possibly for the Fellowship, as well as the Scholarship, Programme). Accordingly, **it is recommended** that a small Reference, or Working, Group, with an advisory function, be established. The Group might be chaired by a member of the Foundation, or a Director. Those invited to participate might include some who have served as file reviewers or interviewers, and others recommended by University Presidents, Principals or Rectors, or Deans of Graduate Studies. The Foundation would be well-advised to allow the Group at least 12 months to consider the issue and to reflect on the information and opinions gathered, prior to the preparation of its report and conclusions.

-Accept. Create a small working group in the spring of 2006 to consist of not more than four people to look at the issue for both Scholarships and Fellowships. Give a six-month mandate to consult with universities, the Canada Council for the Arts, the SSHRC, and past file reviewers; then to prepare a short report with concrete recommendations for the President to bring to the Board. (Action: President).

3. On the apparent shortage of Francophone candidates, as in the case of the Humanities, **it is recommended** that the Foundation contemplate undertaking a further assessment of the issue with the support of a small Working Group, composed on similar lines, and drawn from relevant stakeholders. In the “Francophone case”, it will be helpful if the Group first consider whether there really is a “problem”, or whether, in fact, the numbers are more-or-less as they should be. This will be important for the Foundation, as a first step, before it considers investing further resources in systematic efforts to facilitate enhanced participation.

-Not necessary. In the last round of Scholarship and Fellowship nominations, undertaken after the preliminary review, there was no “shortage” of francophone candidates. Indeed, nominations of francophone Scholars came from many “English” institutions as well as traditionally francophone institutions. This issue should be monitored by staff, but does not require the investment in a working group at this point. (Action: Monitoring by Executive Director of Programmes).

4. It is recommended that the Foundation give consideration to increasing the maximum number of candidates from six to eight for a few, larger institutions, bearing in mind the graduate enrolment in all relevant disciplines. Without wishing to disadvantage smaller institutions, taking into account the apparent concentration of talent at a small number of institutions, and given the objective to include the most outstanding applicants in the pool, some adjustment here would seem warranted.

-Accept. Allow members of the Group of Ten research-intensive universities to nominate up to eight scholarship candidates. The Members of the Group of Ten are:

- *University of Alberta*
- *University of British Columbia*
- *Université Laval*
- *McGill University*
- *McMaster University*
- *Université de Montréal*
- *Queen’s University*
- *University of Toronto*
- *University of Waterloo*
- *University of Western Ontario*

It is true that the largest talent pools are highly concentrated at a few major universities. Allowing all other universities to name up to six candidates will more than provide for a rich and diverse pool, at least from a geographical perspective. To implement as a pilot project for the 2007 selection process, then to monitor closely. (Action: Scholarships Programme Officer).

5. One of the findings of the Review is that there is a need for more detailed guidelines on how universities should undertake internal selection. A particular concern is the ad hoc nature of arrangements employed by certain universities. **It is recommended** that the Foundation indicate a requirement that a formal Selection Committee be set up at each participating university. Beyond this, guidelines would be couched as recommendations, rather than as mandatory. Despite this, every effort should be made to encourage their adoption.

-Accept in part. We are concerned that the Foundation should not be seen to meddle in the internal processes of universities. Not only might this generate ill-will, it might also make the Foundation vicariously liable – in moral not legal terms – for the flaws that will inevitably arise in the university selection processes. Given the ineptitude that we see in some universities, we do not want the Foundation blamed for processes that it cannot actually control. The last comment highlights the further point that the

Foundation will never (and should never) have the capacity to monitor the internal selection processes of scores of Canadian and foreign universities. However, the Foundation should review its communications with universities before the next selection process is launched and suggest “best practices” that would address both substantive criteria, which we already focus upon, and process criteria. This might actually help some universities to improve their scholarship processes more generally. In particular, a “model” letter of nomination should be prepared and circulated to all universities. The current letters range from the outstanding to the practically useless. (Action: Executive Director of Programmes in consultation with the Scholarships Programme Officer).

6. In order to provide complete assurance to all concerned of fairness in **internal selection procedures** at the Foundation, it will be advisable for the Foundation to maintain a more complete record of its procedures. Accordingly, **it is recommended that** the Foundation adopt the procedure of preparing and maintaining on file an appropriately detailed summary record (within the constraints of any legal advice provided) of what transpires at *each stage* in the selection process where candidate names are removed **for all award competitions**. This includes the distinct stages in internal selection, where decisions are made by Foundation staff: the component of the process where the foundation may be judged to be most vulnerable to external questioning of its procedures. A rationale should be provided for the inclusion of each candidate whose name is carried forward to the next stage.

-Accept with caution. The Foundation should maintain a written record of all positive decisions, justifying why a particular nominee has moved forward at each stage of the selection process where cuts are made to the lists. There is no need to record details of the positive decisions of the ANRC, which serves as a guardian of process, as they would not convey substantive outcomes. (Action: Already implemented; to be monitored by Executive Director of Programmes).

7. It is further recommended that, on an annual basis, the President present a complete report on the selection process and results to the Board (possibly following prior consideration at the ANRC), and that this report be reviewed and then attached to the minutes for future reference.

-Not necessary. The President already reports to the Board on every selection process and result. All written summary materials reviewed by the ANRC are already presented to the Board. The presentation to the Board is already minuted, and the Board must approve or reject the recommendation of the ANRC, as endorsed by the President.

8. It is recommended that the Foundation review the guidelines on ranking procedures to be followed by the File Review Committee (FRC) with a view to ensuring a straightforward way of assigning a ranking to each candidate. Further, **it is recommended** that the Foundation adopt detailed guidelines on its own internal decision-making as it prepares the list of finalists on the basis of the work of the FRC, and that these guidelines be recorded in the Programme Manual.

-Accept. The current guidelines to the FRC will be reviewed before the 2007 selection process. Guidelines will be prepared for the internal ranking process to be added to the Programme Manual in 2006. (Action: Executive Director of Programmes in consultation with the Scholarships Programme Officer).

9. It is recommended that the Foundation increase the size of the FRC to six, and that steps are considered to increase the diversity of the background of its membership.

-Not necessary. It is not clear why one additional person would add considerable value to the FRC. Five separate external reviewers for each file, plus a subsequent interview process, is already an extraordinarily rigorous assessment. Reviewers serve in a voluntary capacity, and FRC members must read up to 60 complex files. Trying to find qualified people willing to serve is not easy. Adding one more each year will reduce the ability to rotate and vary the FRC members over time. As for “diversity”, all reviewers are distinguished university professors, as this stage of the evaluation is based primarily upon academic achievements, with the communication abilities and sense of engagement better measured during interviews. They have been drawn from all regions of the country and many disciplines, with men and women being equally represented. We are trying to find younger professors to participate, and this should be encouraged and monitored. Younger professors may help to broaden the evaluation of “quality” because they are more in touch with emerging issues in their respective disciplines. (Action: President to monitor outreach to younger professors).

10. The Foundation has exercised some discretion in determining the composition of the Finalist pool to make sure that certain groups are adequately represented. This issue is best addressed at the level of the composition of the overall pool of candidates, and working to increase the number of applications of under-represented groups. The Review notes that, by and large, this is the approach which the Foundation has adopted. It is encouraged to ensure that this continues to be the case, and **it is recommended** that it include guidelines on such procedures in its Programme Manual.

-Agreed. Any issues of “under-representation” of specific groups (disciplinary, linguistic, gender, visible minorities, language, etc) are best addressed not through any manipulation of the selection processes, but through enhancements to the pool of eligible candidates. Guidelines will be added to the Programme Manual before the next Scholar selection process is launched for 2007. (Action: Executive Director of programmes in consultation with the President and other staff).

11. It is recommended that the size of each of the two interview panels for the Scholarship award finalists be increased from three to five, with one of the members designated as a chair. This will also provide the opportunity to broaden the base of experience of the panels.

-Agreed in part. For the 2006 interviews the interview panels have already been increased from three to four. Given other recommendations in relation to the interviews, it is not realistic to find 10 appropriate volunteers every year for the interview panels. It is very difficult to find people willing to give up two days (plus travel for some). Expanding to eight people (four on each panel) goes a long way to addressing the issues raised in the evaluation, without making the process too cumbersome to manage. What is more, an interview with five people may be more intimidating than with four. Three had been chosen as the original number specifically to avoid the overwhelming quality of some interview processes. A chair will be designated for each panel as of 2007. It is important to remember that five other people have previously reviewed each file, so with the new system each student will be evaluated by nine independent reviewers and interviewers, plus three members of the Foundation staff, including the President. (Action: Partially completed).

12. It is strongly recommended that, with the support of panel chairs, the Foundation emphasize in its guidance to panellists that the preferred approach to the interview is conversational.

-Agreed. The President briefs each panel before they begin interviews. The conversational style has been encouraged and will be in the future. That being said, it is impossible to control entirely for differences in personality amongst interviewers. (Action: Completed).

13. It is recommended that the Foundation adopt a 40-minute to one-hour interview as the norm, following a consistent format. With the process facilitated by a chair, this will permit each candidate to provide an explanation of her or his research and its relationship to larger issues, while also giving the panel the opportunity to get to know all of the candidates. To ensure fairness, each interview would follow approximately the same procedure and sequence.

-Agreed. Implemented in 2006. (Action: Completed).

14. It is also recommended that there be a Trudeau Fellow, or former Fellow, among the interviewers in each panel, as has often been the case in practice to date. The Fellows should be selected from those who have been most active in Foundation activities, since they will have greater experience with the various qualities of successful Scholars.

-Agreed. Previously implemented. The Foundation also invites Mentors and Past Mentors to be interviewers. We may also ask Trudeau Scholar Alumni to take part a few years after “graduating.” Of course, implementation will continue to be conditional upon the availability of Fellows and Mentors on specific dates; there is little flexibility on the timing of interviews because of the various steps in the process of selection that must all take place before Board ratification. (Action: Completed).

15. It is recommended that the Foundation request individual members of the panels to rank each candidate and to record the assigned rating, using an agreed numeric ranking

system. Each interviewee would be ranked separately by each member of the interviewing panel. A member of the staff should be present to assist the chair and to keep a general record of proceedings, enabling that individual to act as a resource person and a “prompt” to the chair in the final discussions to decide on the fate of marginal candidates.

-Agreed in part. Implemented in 2006. However, it is important not to turn the interview process into a mere accounting exercise. In briefing the interview panels, the President should make clear that the numbers are a starting point for the discussion that the panels should pursue in relation to each candidate. Interviewers should feel free to change their minds in the light of those discussions. (Action: Completed).

16. Instead of maintaining the current group process of assessing candidate rankings within each panel, **it is recommended** that at the close of interviews, in collaboration with the panel chairs, the Foundation staff members who have assisted the two chairs calculate the average rankings for each candidate, and determine an order of merit based on these figures. A meeting would then be held involving the two chairs and the Foundation team, led by the Executive Programme Director, along with the two Fellows who have served as panel members, to make decisions among marginal candidates.

- Agreed in part. Implemented in 2006. However, the individual panels must be accorded time to discuss the relative merits of candidates before the Chairs meet with the staff. It would not be appropriate for the raw numbers to serve as the basis for final rankings. Opinions of the interviewers need to be tested in discussion to avoid unfair (and non-transparent) evaluations. (Action: Completed)

17. In order to make for shared information on all candidates and a fairer process of assessment at this last stage, **it is recommended** that the two chairs and the two Fellows be asked to review all files, including those assigned to the panel in which they will not participate, in advance. To make this request more reasonable, it may be that the staff will have additional work to do in preparing more detailed summaries of the file for each candidate.

-Agreed in part. Already implemented during the 2006 selection process. Each panel will receive full files for all the students to be interviewed. (Action: Completed).

18. To complete the package of proposals for adjustment to the selection process for the Scholarship Programme, as discussed above, **it is recommended** that the Foundation plan an extended selection process at the final stage, beginning early on Friday evening, and concluding on Sunday afternoon. This would provide the enabling environment in which all the other recommendations might be implemented effectively. If required, it would also allow for the possibility of allowing for a modest increase in the number of candidates to be interviewed.

-Agreed. As of the 2006 selection process, the interviews have been extended over a two-day period (actually a Friday and Saturday) to allow for longer interviews and more committee discussion. (Action: Completed).

The Fellowship Programme

1. It is apparent that the practice of sending out one nomination letter for both Fellows and Mentors may contribute to some confusion, and **it is recommended** that separate letters be sent out in the future – or separate attachments to one letter - with the differences between the two competitions spelled out even more starkly than before.

-Agreed. In the summer of 2006, the invitation to nominate Fellows and Mentors will be sent out as separate attachments to one letter. As had been intended from the beginning, some former Fellows and Mentors will be added to the pool of nominators. It may be that university presidents should not be invited to submit Mentor nominations. Few currently do. However, the Foundation has received a few good nominations for Mentorships from some university presidents. The nominator pool for Mentorships should be monitored and re-considered in 2007. (Action: Executive Director of Programmes).

2. It is recommended that the Foundation hold discussions with the universities (at the VP and Dean's level, and not merely through consulting University Presidents) on the confidentiality provision in the nomination process, in considering whether a change might be considered, and in assessing the consequences of making adjustments to the process.

-Not necessary. The confidentiality of the selection process for Fellows is one of the trademarks of the Foundation. The practice is borrowed from the rich experience of the MacArthur Fellows Programme. In our opinion, the advantages far outweigh any challenges. Confidentiality ensures that there is no lobbying of nominators. It also tends to allow for more creative risk-taking in nominations; one does not have to justify the nomination to the broader academic community – a process which tends to produce collections of the great and the good, or career achievement recognition, but not creative up-and-comers. In addition, the idea that one does not know that one has been nominated makes the award a complete surprise, and more prestigious. This has proven to be the key factor in generating interest and profile for awards, according to the Director of the Fellows Program of the MacArthur Foundation, with whom we have consulted. What is required is reinforcement of the confidentiality requirement, particularly with some university presidents. The President will keep repeating this message.

3. It is recommended that the Foundation make a thorough assessment of the nomination and file preparation process, with a view to considering how best to improve the quality, detail and relevance of the supporting materials for the nomination of Fellowship candidates. This recommendation, like those which follow, should not be seen as a criticism of the adequacy of present arrangements, but rather as the outcome of this first

opportunity to step back from current practice and consider how best to strengthen the process, based on experience to date. It is recognized that, if this recommendation is followed, there will be implications in terms of increased investment of staff time to make the improvements possible.

-Agreed. The Foundation surveys members of each file review committee to determine how files might be improved. We have received suggestions over the last two years in relation to the language of materials, the choice of writing samples and, especially, the content of letters of nomination. These recommendations are being progressively implemented. More time was devoted this year to research on each nominee. This will be further enhanced in the 2007 selection process. In addition, the President will appoint a new Programmes Assistant by June 2006 to support the work of the programme team. This will facilitate further enhancements to the Fellow files. In addition, a model letter of nomination should be prepared to send to all people invited to serve as nominators (see below in answer to Recommendation 5). (Action: President and Executive Director of programmes in collaboration with PIP Officer).

4. A related issue concerns the List of Nominators and the nomination process. Under the present arrangements, academic candidates considered by the universities as potential nominees must go through an internal selection process, while others may be proposed by one individual, who might or might not be an academic, acting alone. **It is recommended** strongly that the Foundation give further thought to ways of strengthening and professionalizing the Fellowship nomination process.

-Not necessary. There is nothing unprofessional about nominations being drawn from more than one source. Indeed, this is essential if the Foundation is to identify the most creative possible Fellows, not all of whom will surface in traditional peer review processes within universities. The essential problem is that universities typically appoint prize committees to make multiple nominations (to the Killam programme or for SSHRC prizes as well as Trudeau Fellows Prizes). While this is perfectly understandable, the process tends to homogenize nominations. Having a separate group of roughly 100 confidential nominators broadens the pool and encourages diversity and risk-taking. The files can be made commensurable by research done in-house and by providing strong guidance to nominators in preparing letters of nomination. This is where the Foundation should focus efforts in the short term.

5. It is recommended further that the Foundation take the immediate step of requiring that, in proposing a candidate, each nominator secure the support of a seconder, drawn from the list of nominators.

- Not necessary, but an alternative is suggested for the 2007 selection process. The file review committee this year recommended that the Foundation work with nominators to try to ensure greater consistency in the content of the nomination letters. As it stands, some are very complete and helpful, while others are too telegraphic. For the 2007 selection process, the staff will work to try to upgrade the quality of the letters by providing even more detailed guidelines and establishing a “best practices” template.

If the letters can be made more commensurate, then a seconder would not be necessary. The key issue is the substance of the nomination, not “endorsements”. Two people signing off on a weak letter will not provide concrete help to the file review committee. We prefer to focus on the nomination letters this year and to assess progress after a year of experience. For 2008, we may consider instituting a new process of invited second letters, where an acknowledged leader in the field of the nominee is invited to comment on the nominee on a confidential basis. The experience of the MacArthur Foundation should be canvassed. (Action: President in consultation with the Executive Director of Programmes).

6. If there is a desire by the Board and management to include candidates from “the creative fields” whether inside or outside universities, **it is recommended** that a separate group of nominators be established, and that there should be a requirement for nominations to be supported by a second member from within the group. A sub-committee of the File Review Committee of a further five members with the necessary expertise would then review any nominations submitted, and be asked to arrive at the recommendation of one or two names to be included among the final pool. At least one of those participating in the sub-committee would then join the membership of the File Review Committee as an advisor for the one day discussion leading to the final list of nominations to the ANRC.

-Agree in principle that this issue must be addressed, but that it requires more research before a decision on processes of selection is taken. The issue of the awarding of Trudeau Fellowships to creative professionals (writers, artists, musicians, dancers, etc) raises a set of complex issues, especially in the integration of such people within the PIP programme. Some creative artists have integrated very successfully while others remain detached. We believe that this issue needs further investigation. We suggest that we identify this question as a key element in the external programme evaluation to take place in 2007. (Action: President to ensure this issue is front and centre in the terms of reference for the external programme evaluation).

7. Given the importance of the recommendations of the File Review Committee, **it is recommended** strongly that the Foundation institutionalize the practice it has followed in providing for a face-to-face deliberation meeting for the Committee (as in 2005), rather than a conference call. There may well be value in considering adding a sixth member to add to the range of experience and fields of expertise represented.

-Agreed. The Fellow File Review Committee has always met in person, never by conference call. This will continue. The five-member panels have functioned very collegially and effectively. It is not clear that a sixth member would add great value. We are also conscious to conserve the scarce resource of outstanding volunteer peer reviewers. The selection principle has always been that the members of the Fellow File Review Committee should be of a calibre comparable to the nominees themselves. Indeed, some reviewers have actually become Fellows in later years. (Action: Completed).

The Mentorship Programme

1. In the short term, **it is recommended** that the Foundation continue with efforts to strengthen the existing Programme. It is hoped that consideration will be given to encouraging the nominators and reviewers associated with the Mentorship Programme to give more careful attention to the more difficult issues of willingness, ability and availability, on the part of candidates to engage with Scholars. This may also require a rewriting of the letter of nomination, and rethinking the criteria and the guidelines for reviewers. It is suggested that, in the future, some of the most successful Mentors, on completion of their term, be asked to serve as reviewers, and others added to the nominators list.

-Agreed. As part of the continuing process of refinement of the Mentor Programme, these suggestions will all be implemented during the 2007 selection process. In particular, the Foundation will now be able to draw on a pool of past Mentors to serve on the File Review Committee. This has only become possible in the last year. As of 2006, the prospective Mentors were all sent the full written Mentorship agreement before they were asked to agree to take on the role. This agreement clearly sets out expectations and contains as an annex various suggestions for how to connect most effectively. The President then called each prospective Mentor again to ensure that they understood and agreed to the listed expectations. (**Action:** President in consultation with the Executive Director of Programmes).

2. Towards the close of their first year, or at the most appropriate time for the Foundation in its planning, Scholars should be asked if they wish to participate in the Mentorship Programme. Before this, **it is recommended** that there be an opportunity for the first-year Scholars to meet with “veterans” to discuss (among other things) how the Mentorship will enhance the quality of their experience with the Foundation.

-Agreed in part. A Mentor-Scholar meeting was inaugurated in 2006. Mentor-Scholar meetings are held to allow all Scholars, including those in their first year, to interact with the Mentors and to see first hand the value that can accrue in the mentoring relationship. We do not believe that it would be wise to give Scholars the option of not participating in the Mentor programme. We want to allow more time to see the programme evolve. Experiences over the last year have been extremely positive. (**Action:** Completed).

3. **It is recommended further** that the Foundation consider an informal consultation with Scholars on an annual basis to discuss with them, on an individual basis, what they hope to gain from a Mentorship relationship and to provide the opportunity for a frank exchange of views. Their views would then be taken in to account in Scholar-Mentor assignments.

-Agreed. Already implemented in 2005. Will continue. (**Action:** PIP Officer in collaboration with Scholarships Programme Officer).

4. It is also recommended that The Foundation allocate a modest budget to the Programme to permit the holding of a one-day meeting of all Mentors with Foundation staff as soon as possible following their appointment. Ideally, the existing Mentors would join the meeting for a second day. During the second day, plans might be made for an initial Mentor-Scholar meeting to be held later in the year, with a small group to do be selected to do further work in developing a draft plan for the meeting. The group might continue to play a role in initiating other activities and/or consulting others in developing a plan for such events.

-Not necessary. With the implementation of the Mentor-Scholar meetings in 2006, the purpose of the suggested meeting has been fulfilled. The Mentor-Scholar meetings take place immediately after the appointment of the Mentors (January or early February). Mentors come together informally with the Scholars collectively and various means of further connection are discussed. This is further reinforced at the meeting when examples of positive methods of interaction from past Mentoring experiences are provided. The substantive issues of interest to Scholars and Mentors are also aired. Individual meetings are held “on the side” so that the one-on-one mentoring relationships are opened up. The Foundation is increasingly involving the Mentors in other planned activities (such as the Summer Institute and the Trudeau Conference) so that a richer framework for the individual mentoring relationships is being established. Bringing the Mentors alone to the Foundation is not considered a wise expenditure because a number of mentors are now outside Canada and we do not want to expend resources when the Mentors cannot actually meet with students.

5. It is recommended that for the 2007 selection process (there is no immediate urgency for this initiative), the Foundation form a small Working Group to assist the President in considering the options for a remodelled Mentorship Programme and advise the Foundation on options and possibilities for the future. It will be important for the Group to adopt a broad perspective in looking at options, and, with this in mind, it is suggested that it might also include among its members, as well as former Mentors, other individuals drawn from the Trudeau Community who would have an active interest in thinking through alternative directions for the future.

-Agree in principle but would assess whether this working group is needed after the 2007 evaluation. The Mentorship programme has really taken off in the last year, and recent soundings indicate a high degree of satisfaction on the part of the Scholars and the Mentors. The framework for the programme has been substantially enriched over the last few months. We prefer to give a little more time for the programme changes to play themselves out before we use scarce resources for a working group. (Action. President to monitor the mentorship programme in consultation with the Executive Director of Programmes).

6. One possibility which might be examined at some point is a “mixed” model, where different individuals may be selected to make different kinds of contribution to bridging the gap between research and policy and practice, viewed broadly, for the Foundation, and for Scholars in particular. Some might be selected as “conventional” Mentors, while

others might be viewed as a resource to all Scholars and the Foundation as a whole, with a third group contributing through one or two quite intensive activities organized to open up new possibilities and ideas for Scholars. **It is recommended** that consideration of options along these lines be included in the working group's terms of reference.

-Agreed. Already implemented in modified form. All mentors are now provided with opportunities to engage with the entire group of Scholars. We have already seen examples where Mentors have begun to work with and assist Scholars not assigned to that particular Mentor. We are moving to a much more flexible arrangement where the one-on-one relationships are paralleled by collective mentoring experiences, and where some Mentors contribute by organizing specific programme events. (Action: Completed, but to be monitored by the Executive Director of Programme in collaboration with the PIP Officer).

7. For the present, **it is recommended** that in the guidelines for both nomination and selection, priority be assigned to the candidate's ability to be an effective Mentor, drawing on the Letter to Mentors and the appendix to the Letter in making more concrete the kind of approaches taken by effective Mentors. This should assist the FRC in its deliberations. Further, the Foundation might take a close look at the way in which nominee files are prepared to give more attention to emphasizing the aptitude of the candidate as a potential Mentor. In the opinion of the Reviewer, more attention might also be given to a realistic appraisal of the time commitment (both "face time" and communication at a distance) required on the part of both Mentors and Scholars to build and maintain an effective Mentorship, and in advising both nominators, and, later, those selected, of what may be required of them.

-Agreed. The guidelines will be reviewed and revised as necessary in the light of the more recently prepared letters on the appointment of Mentors. The President already has a detailed discussion with each potential Mentor about issues of commitment (including time). This practice will continue. In our experience, the potential Mentors are very cognizant of the time commitments they are making and they think seriously before agreeing to take on the task. This year, the President had up to three discussions with some of the potential Mentors before they agreed to let their names stand. (Action: Executive Director of Programme and President).

The Public Interaction Programme and the Role of Fellows, Scholars and Mentors in the Life of the Trudeau Community

1. It is suggested that while Fellows have been active in the life of the Foundation, it will be necessary for them to play a stronger role in setting the intellectual agenda for the Foundation to achieve its goals. Accordingly, **it is recommended** that the Foundation reflect carefully on its approach to Fellows, and on what they may be expected to contribute as intellectual leaders and guides to the work of the Foundation. Consideration might be given to making adjustments to the selection criteria, to paying more attention in selection to the probable willingness of a candidate to play the role of intellectual leader

and guide in the work of the Foundation. Judging from the information gathered for the Review, Fellows would welcome an enhanced role and greater engagement in helping the Foundation to realize its ambitions.

-Agreed. The Fellows do play a considerable role in the intellectual life of the Foundation, but this can always be enhanced. A concerted effort has already been undertaken to involve Fellows even more in planning. Fellows will be front-and-centre at the first Summer Institute, with their interests shaping all the discussions. The working groups at the Summer Institute will be co-chaired by a Fellow, a Mentor and a Scholar, to foster even greater collaboration within the Trudeau network. Fellows are also taking the lead in a proposed major initiative called “Dialogues on Democracy.” Fellows will also be actively involved in the planning of the 2006 Trudeau Conference. The President should actively encourage and monitor the engagement of the Fellows in all Foundation programmes. (Action: President).

2. Fellows themselves note that there has been no opportunity for them to meet as a group, and **the Reviewer recommends** to the Foundation that to provide for such an opportunity once or twice each year would be a healthy next step in providing a forum where the Fellows themselves may be able to consider ways to take on a more pro-active role in working with the Foundation in setting the intellectual agenda.

-Agreed. To commence in 2006, after the appointment of the next group of Fellows. A meeting of Montreal-based fellows (6) has already taken place, with the emphasis being upon sharing research agendas and looking for points of interconnection. In addition, almost all the Fellows will participate in (and lead) the Summer Institute in June 2006. (Action: President and Executive Director of Programmes in consultation with the PIP Officer).

3. As a contribution to obtaining valuable feedback on the Fellowship Programme and on the role of Fellows in the Foundation, **it is recommended** that formal Exit Interviews be introduced for all Fellows completing their tenure as awardees.

-Agreed. To commence at the end of the term of the first cohort of Fellows, in May 2006. (Action: President).

4. **It is recommended** that the Foundation give consideration to forming a small advisory group, with a continuing role to provide advice from time to time, or respond to concerns raised by the President or the Board relating to the Scholarship programme, with particular reference to “the scholarship experience” and balancing the desire for broadening intellectual horizons with the concern that Scholars complete their academic programmes as expected. While ensuring that the topic of Scholar engagement was central to the group’s concerns, with future needs in mind, the Foundation might prefer to give the group a broader advisory mandate regarding the PIP as a whole. On this basis, **it is recommended that** the group be designated *the PIP Advisory Committee*, with a broader role in offering advice on how to move forward the agenda on building the Trudeau Community.

-Agreed in principle. It is a little too early to create such an advisory group as the PIP programme is in its first complete year of implementation. The current goal is to design and launch a range of PIP activities over a two-to-three-year cycle, and then to assess effectiveness and efficiency. At that point it would be helpful to consider an advisory group for the entire Trudeau Foundation programme. (Action: Possibly to implement during 2008, depending upon the results of the external programme evaluation. President to monitor).

5. As with Fellows, there would be value in introducing an **Exit interview** for Mentors. **It is recommended** that, shortly after completion of their term as Mentors (with the first interviews to be conducted after the members of the first group serving on an 18-month basis complete their term), all holders of the award be asked to take part in an Exit interview. The interview would be structured in a similar way to that envisaged for Fellows.

-Agreed. To be implemented in June 2007, immediately after the first 18-month mentorships are completed. (Action: President and Executive Director of Programme in consultation with the PIP Officer).

6. Funds permitting, **it is recommended** that the Foundation give consideration to the idea of producing an annual high-quality publication to enhance its visibility and influence.

-To be considered as part of a wider reflection on publications to be undertaken by the Foundation in conjunction with its fundraising initiatives in the private sector. There are many routes to support the publication of work produced by Foundation award holders. We need to consider what will be most credible, most cost efficient and most easily distributed. (Action: President, in 2006-2007).

Conclusion

The Foundation has already begun to implement many of the helpful recommendations contained in the Interim Programme Evaluation. For other recommendations, a clear timetable and a division of tasks have been established. In very few cases, the management of the Foundation does not support particular recommendations suggested by the evaluator. In these cases, the disagreement is rarely one of principle, but rather of timely staging of programme development and of strategic use of resources. If the Foundation is able, over the next two years, to implement the recommendations where there is broad agreement, the programmes will be strengthened and the Foundation will be exceptionally well-placed for the external programme evaluation. Mr Rawkins is to be thanked for his professionalism and his thoughtful consideration of the complex and exciting programme of the Trudeau Foundation.