

ANNUAL REPORT

2018
2019



The Pierre Elliott Trudeau Foundation Annual Report 2018-2019

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The Foundation's offices are located on the traditional territory of the Kanien'kehá:ka (Mohawk), a place which has long served as a site of meeting and exchange among various nations.

The Pierre Elliott Trudeau Foundation

600 – 1980 rue Sherbrooke O.

Montréal, QC, CANADA, H3H 1E8

514-938-0001

info@trudeaufoundation.ca

www.trudeaufoundation.ca

 @fdnPETF

 @fdn_pierre_elliott_trudeau

 @fondationtrudeaufoundation

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The Foundation at a Glance

The Pierre Elliott Trudeau Foundation is an independent and non-partisan charity established in 2001 as a living memorial to the former Prime Minister of Canada. In 2002, with the support of the House of Commons, the Government of Canada endowed the Foundation with the Advanced Research in the Humanities and Human Sciences Fund. The Foundation also benefits from private donations.

By granting doctoral scholarships, appointing Fellows, and recruiting Mentors and holding events focused on the dissemination of knowledge, the Foundation encourages critical reflection and action in four areas important to Canadians: Human Rights and Dignity, Responsible Citizenship, Canada and the World, and People and their Natural Environment.

01





Since its inception, the Foundation has:

SUPPORTED

251

DOCTORAL SCHOLARS

helping to develop some of the
brightest minds in Canada and
abroad

GIVEN SCHOLARS
ACCESS TO

146

MENTORS

eminent Canadian public and
private sector leaders who
expose Scholars to a variety
of ideas

PROMOTED THE
WORK OF

75

FELLOWS

who figure among
Canada's top intellectuals

MESSAGE FROM THE CHAIR OF THE BOARD OF DIRECTORS

Patrick Pichette

CHAIRMAN OF THE BOARD OF DIRECTORS



This has been a momentous year of transition and innovation at the Pierre Elliott Trudeau Foundation. Since stepping into the role of Chair of the Board of Directors in November 2018, I had the immense privilege of overseeing, with my fellow Board members, an important period of innovation and renewal for the Foundation.

The Foundation is well anchored in its *raison d'être*, its four themes, its community, and now more than ever, on its commitment to the development of its Scholars as future Engaged Leaders. We have a distinguished history of selecting and fostering some of the most outstanding, bold, and innovative doctoral researchers in the world, and helping open new possibilities for their contributions.

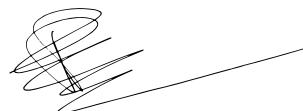
As we chart the way forward, the Foundation's Members and Board of Directors understand that our work must support our Scholars beyond the simple gift of scholarships, but also through innovative approaches that prepare them – and our entire community – for a changing world. The Foundation's latest Strategic Plan solidifies and defines this new focus, ensuring the relevance of our role in developing future academic leaders empowered to bring meaningful change in the world.

With this eye on the future, it is more important than ever to be mindful of the contributions of those who have written the Foundation's success story. In 2019, we undertook an unprecedented

effort to renew the relationship between the Foundation, our community at large, and our alumni network. In July, we appointed a new Alumni Executive that will work to bridge the past with the future through the engagement of past Scholars, Fellows, and Mentors with the active community in our renewed programs.

Our Foundation is a young one – only 16 years old. And yet, it has already produced an amazing cadre of recognized academics and social leaders that are shaping thought leadership in social sciences across our country, and contribute to the *rayonnement* of Canadian values in the world, something I am particularly proud of.

Finally, I could not finish this note without recognizing the immense dedication of the Foundation's staff, Board and Members, many of whom put countless hours and energy to deliver on our mission. For this I am both indebted and grateful.



MESSAGE FROM THE PRESIDENT AND CEO

Pascale Fournier

Ad.E., Ph.D. Harvard University

PRESIDENT & CEO



It is my honour and pleasure to present our Annual Report 2018–2019, which reflects a momentous year of transformation, innovation and renewal in the life of the Pierre Elliott Trudeau Foundation. So many extraordinary developments took place during my first full year as President & CEO, it is challenging to point to one single highlight.

This year, we awarded a record-number 20 doctoral Scholarships to a remarkably diverse, bold, and forward-looking group of Scholars, while transforming our Fellowship and Mentorship programs placing a sharpened focus on teaching our Scholars leadership skills so they grow to become Engaged Leaders with impact in their institutions and communities.

Throughout this year, the Foundation undertook a historic listening and learning tour, the *Future Forums*, to communities in every province and territory. We gathered insights and ideas around Inclusive Excellence and Engaged Leadership, by bringing together participants from academia, as well as the private sector, government, and NGOs. The thought-provoking reflections we collected from hundreds of participants will be a central part of our 2019–2024 Strategic Plan. Now more than ever, we know the academic world is changing, and the Foundation must adapt to stay at the forefront.

We are not waiting to translate new ideas into action. As we look ahead to 2019–2020, we are bringing the Foundation toward new horizons, with the introduction of the *Institutes of Engaged Leadership* built around a scientific theme important to Canadians and the world. This innovative approach promises to provide Scholars

with additional experiences and tools to help them achieve even more impact through their research and their actions within and beyond academia. By taking these bold steps, the Foundation is going further to enable our community to share and democratize knowledge in a meaningful way.

The Foundation recognizes that leading Scholars, more than ever, take risks and experience situations during their research that are highly challenging. As an organization which places our community at the centre of everything we do, I am especially proud of the introduction of two wellness policies this year. Our Policy on the Prevention of Violence and Harassment, and our Policy on Mental Health, together provide a rich framework and offer concrete resources to better ensure the safety and well-being of all.

This year of innovation and renewal has meant change, which is not always comfortable. But I have the firm conviction that the positive changes we have begun to put in place, building on our remarkable past, ensure a bright and stimulating future focused on learning, knowledge-sharing, and community-building.





Programs Overview



In 2019, 183 **Scholarship** applications were considered in the 2019 competition. Canadian nominating universities submitted up to four candidates, while foreign institutions were eligible to submit three candidates. Interviews were conducted by the Application and Nomination Review Committee.

In 2019, 82 Fellow candidates were nominated. The Application and Nomination Review Committee screened and interviewed 14 candidates.

The Foundation appointed seven **Mentors** in 2019 who work with Scholars, teach leadership skills and help them connect to networks in the realms of policy, government, philanthropy, law, business, the arts, and journalism. The Foundation screened 46 candidates, with 14 candidates being assessed by the Application and Nomination Review Committee.

Doctoral Scholarships

Our doctoral Scholarship in the Social Sciences and Humanities is unique in Canada for its scope and stature. Last year, twenty scholarships were awarded to Canadian and foreign doctoral candidates pursuing research related to one of our four founding themes. The renewed Scholarship program of the Pierre Elliott Trudeau Foundation is a gateway for courageous, bold, original thinkers who are hungry to play a leadership role in their communities. The Foundation's three-year program aims to train Engaged Leaders, in order to build the capacity for academics to make their research accessible beyond academia, to partner with a diversity of actors and to help address some of the most pressing domestic and global issues.

Fellowships

Our Fellowships invite academic experts who are recognized for their research excellence and a strong commitment to sharing knowledge beyond the classroom and to imagine innovative approaches to understanding important issues facing society. Fellows play a central role in the leadership development of our doctoral Scholars, empowering them to become the Engaged Leaders of tomorrow. They act as outstanding public educators, dynamic professors and intellectual guides to Scholars over a three-year program cycle.

Mentorships

Our Mentorship program connects highly accomplished and engaged Canadians from the public, private, cultural and not-for-profit sectors with Scholars and Fellows. Our Mentors focus on the leadership development and meaningful impact Scholars could have in the world. Mentors act as leadership trainers, guides, advisors and provide a crucial bridge between the research world and the public sphere during the three-year program.

Public Interaction Programs

In 2018-2019, the Foundation embarked on a pan-Canadian listening and learning tour to tailor the Foundation's mission to better reflect Canada today. The Foundation also worked to build a community of critical and creative thinkers, organized and provided financial and logistical support for events which attracted hundreds of participants. It also launched its *Institutes of Engaged Leadership* program, a three-year curriculum designed to form the leaders of tomorrow.

Future Forums

05

In 2018, the Pierre Elliott Trudeau Foundation embarked on a pan-Canadian listening and learning tour that engaged hundreds of Canadians on the themes of Inclusive Excellence and Engaged Leadership.

These consultative workshops were designed to engage the Foundation community and traditional academic partners as well as NGOs, corporations, and governments.

The *Future Forums* were an instrumental source of input—both from the Foundation’s own community of Scholars, Mentors, Fellows, and alumni, and members of the public—helping to shape the Foundation’s 2019-2024 Strategic Plan.

20

CANADIAN
COMMUNITIES

23

WORKSHOPS

450

PARTICIPANTS

Participants of the *Future Forums* considered the following questions:

What is Inclusive Excellence?

How has Canadian society excluded some forms of knowledge from the mainstream?
How do social inequalities influence the production and use of knowledge?
How can the production of knowledge be used to foster Inclusive Excellence?

What is an Engaged Leader?

What does Engaged Leadership mean to you?
How can leaders ensure more and different individual voices stand out and are heard?
In what ways can leaders successfully foster positive, collective change?

Of the countless lessons learned from this journey, here are the main conclusions:

Excellence in research can only be attained if certain best practices are put forward by the researchers themselves and the institutions that train them. As we have learned from the *Future Forums*, great research must not only serve a purpose, but it must also respond to new realities—whether intellectual, social, cultural, technological, environmental and economic—in communities across Canada and around the world. To target these needs, researchers need to take the time to connect and build relationships with community members, listen and observe as an anthropologist would, and above all, involve the community in the research process.

Great researchers are also expected to exhibit certain human qualities such as active listening, humility, self-awareness, courage and inclusiveness. It is their emotional intelligence and lived experiences that give meaning and depth to their research. Great research also recognizes and values different knowledge sources such as oral traditions, hands-on knowledge and experiential learning approaches because it understands that in order to solve real-world problems, it is important to resort to other ways of thinking and doing.

Cross-sector cooperation is also another important aspect of research in the Social Sciences and Humanities because it allows the enhancement of its scale, scope and impact. Finally, great research also seeks to incorporate creative elements such as artwork in the sharing of its findings because it supports the belief that finding innovative and original ways of producing research is beneficial to the production of knowledge and its democratization. More importantly, great research in 2019 expands our understanding of who we are, who we have been and who we aspire to be. In other words, the *Future Forums* enabled the Foundation to gather ideas and explore new solutions that will guide the development of its new Strategic Plan. The synthesis of these meetings has led, for the benefit of all Canadians, to an enumeration of best practices that will contribute to the professional, intellectual and personal development of the Foundation's Scholars so that they themselves can become Engaged and Inclusive Leaders in their institutions and communities.

FUTURE FORUMS

Edmonton, AB
September 10 – 11, 2018

Yellowknife, NT
September 12, 2018

Calgary, AB
September 13, 2018

Whitehorse, YT
October 2 – 3, 2018

Iqaluit, NU
October 29, 2018

Halifax, NS
November 15 – 16, 2018

Fredericton, NB
December 3, 2018

Moncton, NB
December 4, 2018

St. John's, NL
December 5, 2018

Charlottetown, PE
December 6, 2018

Toronto, ON
January 14 – 15, 2019

Kingston, ON
January 16, 2019

Ottawa, ON
January 17, 2019

Montréal, QC
February 4, 2019

Val D'Or, QC
February 5, 2019

Québec City, QC
February 7, 2019

Regina, SK
February 26, 2019

Winnipeg, MB
February 28, 2019

Vancouver, BC
March 19, 2019

Victoria, BC
March 21, 2019

PUBLIC INTERACTION

Private Refugee Sponsorship: Concepts, Cases and Consequences.

With the support of the Pierre Elliott Trudeau Foundation and the Global Migration Lab at the Munk School of Global Affairs, 2014 Scholar Geoffrey Cameron and 2008 Scholar Shauna Labman held a two-day seminar at the University of Toronto on private refugee sponsorship in Canada on 18-19 October 2018.

Canadian Contributions to Social Justice in the World of Work: Transnational Futures of International Labour Law.

To mark the 100th anniversary of the International Labour Organization (ILO), 2016 Fellow Adelle Blackett introduced a 12-week lecture series held at McGill's Faculty of Law called Transnational Futures of International Labour Law. The series ran between 10 January and 11 April 2019.

The seminars featured talks by several other Foundation community members including 2003 Scholar Robert Leckey, 2008 Fellow François Crépeau, 2017 Fellow Bernard Duhaime, 2016 Fellow Poonam Puri, 2016 Mentor the Hon. Louis LeBel, and 2014 Scholar Joanna Langille.

Best Practices for Effective, Democratic Transfers of Executive Power.

To determine the success factors for this crucial transfer of power, the Pierre Elliott Trudeau Foundation hosted the National Democratic Institute at its offices for an international symposium on 1-2 November 2018 in Montreal.

Un pas de plus vers l'autodétermination: Victoire Atikamekw en protection de la jeunesse.

In collaboration with the Ligue des droits et libertés and the Léo-Cormier Foundation, our 2012 Mentor Bernard Richard participated in a panel discussion to better understand the fight for their rights and the victory of the Atikamekw and how to develop links of solidarity, held at the Centre Saint-Pierre in Montreal on 26 November 2018.

Taking Mental Health Seriously

The Pierre Elliott Trudeau Foundation takes the well being of our community to heart. As of January 1st, 2019, our mental health policy has been in place, offering a variety of services to all active Scholars.

We recognize that our Scholars can experience considerable pressure and emotional challenges when producing leading-edge research, conducting fieldwork, writing, responding to critiques and coping with other institutional stresses.

Supporting mental health and well-being requires various types of support. That is why our policy includes access to qualified mental health professionals and other services to address a range of topics.

LOOKING AHEAD:

Leadership Programs

The Pierre Elliott Trudeau Foundation offers a bold and unique program to its Scholars. Fellows and Mentors play a central role during the different events and *Institutes of Engaged Leadership* organized by the Foundation. The objective is to empower Scholars to have impact in the world by equipping them with the tools to be leaders in their communities.

Our leadership curriculum is based on a scientific theme that will guide Scholars throughout their tenure, encouraging them to look beyond their expertise and develop a desire to engage with people, issues and ideas typically outside their academic training.

2019:

Power and Knowledge

The 2019–2022 program cycle of the Pierre Elliott Trudeau Foundation focuses on the dynamic relationship between the themes of power and knowledge, with the first *Institute of Engaged Leadership* in Yellowknife, NT in October 2019. The second Institute is expected to take place in March 2020 in Washington, D.C. Understanding power-knowledge relationships and the roots of power imbalances are essential to changing situations of social injustices.

2020:

Technology and Ethics

The Pierre Elliott Trudeau Foundation 2020–2023 program cycle will explore the concepts of Technology and Ethics with its future Scholars, Fellows and Mentors. Considering critical issues raised by recent technological advances in the areas of biotechnology and artificial intelligence, this innovative module will question the incorporation of artificial intelligence in health care systems and examine how humanity will be shaped by these advances. As part of this scientific theme, *Institutes of Engaged Leadership* and related events will be held in Moncton, Montreal and Helsinki in 2020 and 2021.

The Foundation in 2019–2020



Looking ahead, in 2019–2020 the Foundation will adopt a new five-year Strategic Plan which will draw from three sources: the *Future Forums* public consultation process, a Five-Year Evaluation report, and a demographic survey which was submitted to active and alumni Scholars, Fellows, and Mentors.

Each of these sources provided insights on the impact and relevancy of the Foundation's programming and its work, which will help establish the course of the Foundation's revitalization efforts and innovation within its programs. The 2019-2024 Strategic Plan will reflect short- and medium-term priorities and objectives and define the steps the Foundation will take to achieve them. As well, the Foundation will develop the operational strategies to implement the Strategic Plan.

In mapping out future objectives through the Strategic Plan, the Foundation will lay out the implementation of new programming, address gaps that were raised in the Five-Year Evaluation, and establish a robust measurement framework that will enhance the Foundation's accountability

and allow it to collect data that will be actionable and reflect the impact of the Foundation's activities.

Regarding the Five-Year Evaluation specifically, the Foundation has begun work to address all of the recommendations made by the independent evaluator. While some of the technological recommendations will require some time, recommended changes and adjustments to programming are now being reflected in the updated model for the Foundation's programs.

Finally, we will continue to ensure the Foundation's financial sustainability and develop new mechanisms to support our community through current and future initiatives.

“As a Pierre Elliot Trudeau Foundation Mentor, I had the opportunity to offer support to Scholars who are applying their life experiences in complex and topical policy areas such as human rights and public health. I have learned so much from my Scholars.”

Mary Anne Chambers has had a long and prestigious career in public service and in the private sector before joining the Pierre Elliott Trudeau Foundation as a Mentor in 2018. Previously Minister of Training, Colleges and Universities and Minister of Children and Youth services in the Government of Ontario, she also held various positions in the financial world.

Having personally funded scholarships for university and college students in Ontario, Chambers came on board with the Foundation to support and build the capacities of future leaders to contribute to the development of impactful and sustainable public policies.

MENTOR, 2018

**Mary Anne
Chambers**



Two central themes that have guided the career of Pauline D'Amboise are leadership and sustainable development. As Secretary-General of the Mouvement Desjardins, and as Vice President of the organization's governance and sustainable development, she oversees the development of strong policies on ethics, governance, and sustainable development, as well as overseeing the Desjardins Foundation and the Desjardins Historical Society.

Pauline D'Amboise finds her role as a Mentor with the Pierre Elliott Foundation a natural fit, given

the importance she places on perseverance and success in education.

Thanks to the active role the Foundation's Mentors play, Pauline D'Amboise is an outstanding leader who helps to build bridges between engaged leaders of today and those of tomorrow.

"It is important to support people who choose to go deeper and to encourage them to stand up and assume leadership roles."

“My relationship with the Foundation has served to reinforce my conviction towards the importance of promoting inclusion and dialogue within different communities across Canada, including First Nations, to support the evolution of Canadian society and the preservation of our openness toward the world.”

MENTOR, 2018

**Pauline
D'Amboise**



SCHOLAR, 2018

Spencer Greening



Spencer Greening always had a great sense of community. His Ph.D. research emphasizes the importance of Indigenous knowledge and stewardship of land in context of colonial management practices and law. By working with his own ancestral knowledge systems, he can highlight local Indigenous knowledge and its vital role in academic scholarship, Canadian public policy, and the promotion of environmental awareness.

For Spencer, being part of the Pierre Elliott Trudeau Foundation has allowed for deep and meaningful conversations and collaboration with amazing Scholars and change makers. The blending of the community's rich diversity of people, ideas and support throughout his research process has led him to be more successful within his field of work, while finding better understanding of where his own Indigenous knowledge and voice can fit within academia, politics and decolonization.

Through the empowerment of Indigenous rights, titles and knowledge systems, this style of research strengthens Indigenous resilience in the face of environmental degradation and further colonization, while making way for environmentally sound decision-making when climate change and questions of sustainability are so pressing.

SCHOLAR, 2018

Marie-Soleil L'Allier



“The Pierre Elliott Trudeau Foundation opened the door for me to meet other researchers, political actors, and activists who do cutting-edge work that is already happening in Europe. The connections that I’ve made provide important support to the development of my research and allow me to deepen my reflection and build an international network.”

Marie Soleil L'Allier's work involves the resurgence of citizen-based initiatives that are built around socially sustainable practices. Her leadership led to the creation of LOCO in 2015, the first zero-waste chain of food markets in Quebec.

The Pierre Elliott Trudeau Foundation offered an opportunity to join a network where the sharing of knowledge and international aid are valued.



“

The Foundation continually reminds me of the obligations I have. Not just to conducting research, but also to ensuring that research is usable, accessible and makes a tangible difference in society.

”

SCHOLAR, 2017

Jamie Snook

The Pierre Elliott Trudeau Foundation has provided me with the unprecedented opportunity to continue to study, research and live in the North, and to work with crucial Indigenous leaders, scholars and decision makers across the North. The Foundation has also connected me with an exceptional academic community from whom I am continually learning.

As an Inuk from Labrador and Executive Director of the Torngat Wildlife, Plants and Fisheries Secretariat, Jamie Snook always had a holistic perspective of the Labrador region and its communities. His work is both inspired and driven by the need to ensure the sustainability of fish and wildlife so that Inuits can continue to live a life they always had and ensure the survival and strength of communities.

Jamie's research examines how fish and wildlife resources connect with and support Indigenous health and well-being, and how modern-day land claim agreements can actively include holistic understandings of Indigenous health in decision-making and recommendations around resource usage and stewardship.

A close-up portrait of Wendell Adjetey, a Black man with a short beard and mustache, smiling warmly. He is wearing a dark suit jacket, a white shirt, and a patterned tie. The background is a blurred cityscape.

SCHOLAR, 2014

Wendell Adjetey Ph.D.

As a first-generation high school attendant and graduate, Wendell Adjetey worked his way to a Ph.D. in history from Yale University. Becoming a Scholar of the Pierre Elliott Trudeau Foundation in 2014, his doctoral research examined the ways in which twentieth-century African North Americans and their diasporic counterparts forged transnational freedom linkages around civil rights and organized labour in the inter- and post-war years.

Following his education, Wendell has worked as a social entrepreneur, a humanitarian and a historian, cofounding the Tujenge Africa Foundation, a non-profit educational and cultural incubator that supports communities in sub-Saharan Africa. Alumni of the Pierre Elliott Trudeau Foundation, Wendell remains active in the community by frequently participating to various events organized by the Foundation.

A portrait of Kim TallBear, a woman with short, wavy, reddish-brown hair, wearing a black top and large, ornate silver earrings. She is smiling slightly and looking towards the camera. The background is a light-colored brick wall.

FELLOW, 2018

Kim TallBear Ph.D.

Professor Kim TallBear is an Associate Professor, Faculty of Native Studies and Canada Research Chair in Indigenous Peoples, Technoscience & Environment, University of Alberta. She is a graduate of the University of California, Santa Cruz, and the Massachusetts Institute of Technology.

Professor TallBear has advised science museums on issues related to race and science. She also advised the former President of the American Society of Human Genetics on issues related to genetic research ethics with Indigenous populations. She is a founding ethics faculty

member in the Summer Internship for Indigenous Peoples in Genomics (SING) and has served as an advisor to programs on genome ethics at Duke University and Stanford University.

Through the Pierre Elliott Trudeau Foundation, she was able to launch the RELAB project, a research-creation laboratory, with the objective to foreground Indigenous theories, standpoints, and self-determination by blending social science and humanities research with creative practice in research, performance, and exhibition space. She is also a co-producer of *Tipi Confessions*, a key project of the RELAB.

2019 Scholars

08

THIS YEAR, THE FOUNDATION SELECTED 20 OUTSTANDING PH.D. STUDENTS FROM ACROSS CANADA AND ABROAD.

All of our Scholars are actively engaged in their fields and are poised to become leading figures within and beyond academia. The Foundation's renewed three-year program aims to train Engaged Leaders in order to build the capacity for academics to make their research accessible.

Scholars receive up to \$40,000 annually for three years in base funding support, and up to \$20,000 as an allowance for research, travel, networking, and for attending Foundation events alongside other members of our dynamic community.



01

Vanessa Ambtman-Smith

Geography, Western University

examines the meaning and use of traditional healing spaces within hospital contexts and whether these spaces represent a form of conciliation.

04

Andreae Callanan

English literature, Memorial University

studies the relationship between poetry, cultural identity and social responsibility.

07

Kody Doxtater

Health sciences, Simon Fraser University

investigates how to develop a culturally appropriate Indigenous tobacco strategy.

10

Suzanne Kite

Fine arts, Concordia University

is concerned with contemporary Lakota epistemologies through research-creation, computational media and performance practice.

13

Cindy Ma

Cultural studies, University of Oxford

investigates the function of irony, humour and satire in the dissemination of racist ideology online.

16

Martha Paynter

Nursing, Dalhousie University

is a registered nurse and her research explores maternal health in Canadian Prisons.

19

Darren Saunders

Linguistics, Université du Québec à Montréal

focuses his research in language recognition, signing and the contribution of deaf intellectuals.

02

Patricia Bérubé

Cultural mediations, Carleton University

researches issues of accessibility and renewal of the museum discourse for visually impaired audiences.

05

Carlo Charles

Sociology and geography, McMaster University and Université des Antilles

researches how cross-cultural understandings of race, ethnicity, and nationalism shape the socio-political integration of Haitian refugees in Canada and France.

08

Jarita Greyeyes

Graduate school of education, Stanford University

studies race, inequality and language in education.

11

Riley Kucheran

Communication and design, Ryerson University

analyzes clothing and colonization, contemporary Indigenous fashion design and how entrepreneurship can contribute to Indigenous cultural and economic resurgence.

14

Linda Mussell

Political studies, Queen's University

is interested in breaking cycles of intergenerational incarceration in countries grappling with colonial legacies, specifically Canada, Australia and New Zealand.

17

Holly Prince

Education, Lakehead University

is working in the field of palliative and end of life care with Indigenous people.

20

Steven Vanloffeld

Geography, Western University

investigates consent and development in Indigenous territories as it relates to nuclear waste disposal.

03

Edith Brunette

Political science, University of Ottawa

is interested in the different conceptions of Canadian artists' freedom and the influence of these conceptions on their political engagement.

06

Abigail Curlew

Sociology, Carleton University

explores gender policing, doxing and transmisogyny in the digital world.

09

Nataleah Hunter-Young

Communication and culture, Ryerson University

documents the sociocultural impact of social media police brutality videos and their contemporary artistic representations.

12

Caroline Leblanc

Public health, Université de Sherbrooke

brings her lived experience to her research, which explores how to improve access and adequacy of resources for homeless people during winter.

15

Éloïse Ouellet-Décoste

Political science and law, Université du Québec à Montréal

focuses on the righting of violations of the rights of Indigenous peoples.

18

Diane Roberts

Fine arts, Concordia University

is an accomplished director, dramaturge, writer, and PhD candidate in Fine Arts.

2019 Mentors

THE FOUNDATION APPOINTED SEVEN MENTORS IN 2019 WHO TEACH LEADERSHIP SKILLS TO OUR SCHOLARS AND HELP THEM CONNECT TO NETWORKS IN THE FIELDS OF POLICY, GOVERNMENT, PHILANTHROPY, LAW, BUSINESS, THE ARTS AND JOURNALISM.

The Foundation's mentorship program is an innovative experiment that seeks to forge intellectual and personal bonds between renowned Canadians and Ph.D. students. Through the scientific theme of Power and Knowledge,

Scholars are exposed to ideas and experiences that they may not encounter in a university context and are empowered to develop valuable new skill sets as Engaged Leaders.



01

Lia Grimanis

has many years of experience in non-profit leadership and managing complex projects in the technology sector. She is the founder of Up With Women, an organization dedicated to helping homeless women and children to rebuild their lives.

02

Christine Hanson

is an international lawyer and diplomat who has held a variety of roles at Global Affairs Canada. She is currently CEO of the Nova Scotia Human Rights Commission.

03

Nadia Joe (Keghaala)

is a leader in water management and wastewater treatment. She is an advocate for the advancement of Indigenous communities, particularly in water protection and watershed governance.

04

Rita Karakas

has considerable expertise in corporate planning, organizational change and strategic management planning. Founder of RSK Associates Inc, an international strategic management advisory practice, she has worked with many global clients and organizations.

05

Shannon Litzenberger

is an award-winning contemporary dance artist, producer, arts advocate and leadership developer.

06

Laxmi Parthasarathy

is Chief Operating Officer of Global Press. She leads global operations and has accumulated considerable experience in media and communications with prestigious companies and organizations.

07

Robert Steiner

is Director of the Dalla Lana Fellowship in Global Journalism at the Dalla Lana School of Public Health Sciences at the University of Toronto. He has led a distinguished career in journalism, business, and politics.

2019 Fellows

The Foundation appointed five Fellows in 2019, who are outstanding Canadian intellectuals who have set themselves apart through their research achievements, their creativity, and public

engagement. Over a three-year cycle, Fellows help lead the *Institutes of Engaged Leadership* on Power & Knowledge and provide guidance and support to the Scholars.



01

Marie Battiste, Ph.D.

is a Full Professor in the College of Education at the University of Saskatchewan. Mi'kmaq from the Potlotek First Nation, she pursued research advancing Indigenous education, social justice and institutional change. She holds graduate degrees from Harvard and Stanford universities.

02

Candis Callison, Ph.D.

is an Associate Professor at the Graduate School of Journalism at the University of British Columbia. Her research and teaching are focused on changes to media practices and platforms, journalism ethics, the role of social movements in public discourse and understanding how issues relate to science and technology.

03

Cynthia Milton, Ph.D.

is a Professor in the Department of History at l'Université de Montréal and Past President of the College of New Scholars of the Royal Society of Canada. Her interdisciplinary research project studies inclusive modes of truth-telling, truth commissions and cultural interventions in the construction of historical narratives following state violence.

04

Aimée Morrison, Ph.D.

is Associate Professor in English at the University of Waterloo, where she specializes in digital media. She teaches about visual culture, social media, academic writing and selfies as autobiography.

05

Christian Nadeau, Ph.D.

is Full Professor of Philosophy at l'Université de Montréal. His research addresses the moral philosophy of responsibility and the political philosophy of theories of democracy. He was also a visiting professor at several universities in France and has been president of the Ligue des droits et libertés du Québec since 2015.

Alumni Network



THE ALUMNI NETWORK BRINGS TOGETHER FORMER PIERRE ELLIOTT TRUDEAU FOUNDATION SCHOLARS, MENTORS AND FELLOWS WHO PLAY AN ACTIVE ROLE IN PUBLIC AND ACADEMIC SECTORS.

The Alumni Network's mandate is to foster productive and long-term relationships among all Foundation community members, contribute to the Pierre Elliott Trudeau Foundation network's growing momentum and drive reputation as an influential source of innovative ideas.

The members of the Alumni Network Executive Committee were selected based on their outstanding achievements and ongoing commitment to support the Foundation and its vibrant and diverse community. The new members of this Executive Committee will have

the mission of making the Alumni Network more active by playing a positive role in supporting the Foundation's initiatives. Community members across Canada and around the world will be invited to join activities related to the Foundation's four themes: Human Rights and Dignity, Responsible Citizenship, Canada and the World and People and their Natural Environment.

Each member of the Alumni Network Executive Committee also contributes to the Foundation's community-building by organizing one public event every year.

01

**Lisa Helps,
co-president**

Mayor of Victoria
2006 Scholar



02

**Robert Leckey,
co-president**

Dean of the Faculty of Law,
McGill University
2003 Scholar



03

Libe Garcia Zarranz

Associate Professor,
Norwegian University of
Science and Technology
2010 Scholar



04

Jean Lebel

President, International
Development Research Centre
2016 Mentor



05

Steven Loft

Director, Aboriginal Arts Office,
Canada Council for the Arts
2010 Fellow



06

Romeo Saganash

Former Member of Parliament
2005 Mentor



07

Sophie Theriault

Vice-Dean (Academic), Faculty
of Law, University of Ottawa
2003 Scholar



Governance



In accordance with the Canada Not-For-Profit Corporations Act, the Pierre Elliott Trudeau Foundation is governed by two bodies: the Foundation's Members and its Board of Directors. These diverse, dynamic, and deeply engaged governance teams help to guide the mission and actions of the Foundation, which represents an instrument of knowledge-sharing within our community and the broader public.

Members

serving between
September 1, 2018 and
August 31, 2019*

- Thomas Axworthy
- Dennis Browne
- William Davis
- John English
- Ron Graham
- Sacha Haque
- Louise Houle
- Edward Johnson
- David Johnston
- Marc Lalonde
- Frederick Lowy
- Joseph MacInnis
- Bruce McNiven
- Farah Mohamed
- Robert Murdoch
- Patrick Pichette
- Sean Riley
- Roy Romanow
- Peter Sahlas
- Nancy Southam
- Janice Stein
- Stephen Toope
- Alexandre Trudeau

Directors

serving between
September 1, 2018 and
August 31, 2019*

- Kim Brooks
- Suzanne Fortier
- Jameel Jaffer
- Edward Johnson
- Megan Leslie
- John McCall MacBain
- Bruce McNiven
- Mélanie Millette
- Farah Mohamed
- Bessma Momani
- Patrick Pichette
- Madeleine Redfern
- Duncan Reid
- Marc Renaud
- Sean Riley
- Peter Sahlas
- Alexandre Trudeau
- Jennifer Welsh

Application and Nomination Review Committee

- Thomas Axworthy
- Nick Blomley
- Julia Christensen
- Aimee Craft
- Libe Garcia Zarranz
- Jean-François Gaudreault-Desbiens
- Robert Huish
- Fannie Lafontaine
- Rebecca Mearns
- Mona Nemer (Chair)
- Deborah Saucier
- David Theodore
- Alexandre Trudeau
- Jennifer Welsh
- Sanni Yaya

* The mandates of some Members and Directors began or finished over the course of the fiscal year

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- City of Iqaluit
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- Memorial University
- Montréal Museum of Fine Arts
- Munk School of Global Affairs and Public Policy, University of Toronto
- Muriel McQueen Fergusson Centre for Family Violence Research
- Nova Scotia Human Rights Commission
- Osgoode Hall Law School, York University
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- Royal Society of Canada
- Social Enterprise Centre, Winnipeg
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- The Honourable W. Thomas Molloy, Lieutenant-Governor of Saskatchewan
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Financial Statements

AUGUST 31, 2019

Independent Auditor's Report

NOVEMBER 8, 2019

To the directors of The Pierre Elliott Trudeau Foundation

Our opinion

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of La Fondation Pierre Elliott Trudeau / The Pierre Elliott Trudeau Foundation (the "Foundation") as at August 31, 2019 and the results of its operations and its cash flows for the year then ended in accordance with Canadian accounting standards for not-for-profit organizations.

What we have audited

The Foundation's financial statements comprise:

- the statement of financial position as at August 31, 2019;
- the statement of changes in net assets for the year then ended;
- the statement of revenues and expenses for the year then ended;
- the statement of cash flows for the year then ended; and
- the notes to the financial statements, which include a summary of significant accounting policies.

Basis for opinion

We conducted our audit in accordance with Canadian generally accepted auditing standards.

Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Independence

We are independent of the Foundation in accordance with the ethical requirements that are relevant to our audit of the financial statements in Canada. We have fulfilled our other ethical responsibilities in accordance with these requirements.

Responsibilities of management and those charged with governance for the financial statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with Canadian accounting standards for not-for-profit organizations, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is responsible for assessing the Foundation's ability to continue as a going concern, disclosing, as applicable, matters related

to going concern and using the going concern basis of accounting unless management either intends to liquidate the Foundation or to cease operations, or has no realistic alternative but to do so. Those charged with governance are responsible for overseeing the Foundation's financial reporting process.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with Canadian generally accepted auditing standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements. As part of an audit in accordance with Canadian generally accepted auditing standards, we exercise professional judgment and maintain professional skepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Foundation's internal control.

- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Foundation's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Foundation to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

PricewaterhouseCoopers LLP¹

PricewaterhouseCoopers LLP
1250 René-Lévesque Boulevard West, Suite 2500, Montréal,
Quebec, Canada H3B 4Y1
T: +1 514 205 5000, F: +1 514 876 1502.

¹"PwC" refers to PricewaterhouseCoopers LLP, an Ontario limited liability partnership.

Statement of Financial Position

AS AT AUGUST 31, 2019

Assets	2019 \$	2018 \$
Current Assets		
Cash and cash equivalents	781,535	766,865
Prepaid expenses and other receivables	374,976	275,003
	1,156,511	1,041,868
Investments at fair value (note 4)	143,778,124	144,474,048
Property and equipment (note 5)	473,147	536,269
Intangible assets (note 6)	75,574	5,829
	145,483,356	146,058,014

Liabilities		
Current Liabilities		
Accounts payable and accrued liabilities	1,394,635	1,627,733
Current portion of scholarships payable (note 8(a))	1,643,490	1,327,398
Current portion of fellowships payable (note 8(b))	690,267	857,507
Current portion of mentorships payable (note 8(c))	135,762	147,001
	3,864,154	3,959,639
Deferred donations (note 7)	238,079	238,079
Scholarships payable (note 8(a))	1,641,533	1,717,974
Fellowships payable (note 8(b))	460,193	406,256
Mentorships payable (note 8(c))	34,033	124,854
	2,373,838	2,487,163
	6,237,992	6,446,802

Net Assets		
Net assets restricted for endowment purposes (notes 3 and 9)	125,000,000	125,000,000
Net assets invested in property and equipment and intangible assets (notes 3, 5, and 6)	549,547	542,924
Internally restricted net assets (notes 3 and 10)	11,564,190	11,976,595
Unrestricted net assets (notes 3 and 11)	2,131,627	2,091,693
	139,245,364	139,611,212
	145,483,356	146,058,014

Statement of Changes in Net Assets

FOR THE YEAR ENDED AUGUST 31, 2019

	2019				2018	
	Restricted for endowment purposes \$ (notes 3,9)	Invested in property and equipment and intangible assets \$ (notes 3,5,6)	Internally restricted \$ (notes 3,10)	Unrestricted \$ (notes 3,11)	Total \$	Total \$
Balance – Beginning of year	125,000,000	542,924	11,976,595	2,091,693	139,611,212	139,047,650
Excess of revenues over expenses (expenses over revenues) for the year	–	(109,690)	(296,092)	39,934	(365,848)	563,562
Investment in property and equipment and intangible assets	–	116,313	(116,313)	–	–	–
Balance – End of year	125,000,000	549,547	11,564,190	2,131,627	139,245,364	139,611,212

Statement of Revenues and Expenses

FOR THE YEAR ENDED AUGUST 31, 2019

Revenues	2019 \$	2018 \$
Investment revenue	2,618,185	3,055,669
Net gain (loss) on disposal of investments at fair value	438,178	(808,412)
Net unrealized gain on investments at fair value	2,880,620	3,748,508
Donations (note 15)	143,535	115,609
	6,080,518	6,111,374

Expenses		
Public Interaction program (note 14(b))	1,067,058	919,768
Scholarship program	2,012,257	703,035
Fellowship program	781,520	828,737
Mentorship program	137,476	209,412
Program planning and delivery (note 16)	1,573,079	1,350,062
Administration (note 16)	206,039	432,400
Investment management (note 16)	303,229	322,393
Outreach, development and other (note 16)	365,708	782,005
	6,446,366	5,547,812
Excess of revenues over expenses (expenses over revenues) for the year	(365,848)	563,562

Statement of Cash Flows

FOR THE YEAR ENDED AUGUST 31, 2019

Cash flows from	2019 \$	2018 \$
Operating activities		
Excess of revenues over expenses (expenses over revenues) for the year	(365,848)	563,562
Items not affecting cash and cash equivalents		
Net loss (gain) on disposal of investments at fair value	(438,178)	808,412
Net unrealized gain on investments at fair value	(2,880,620)	(3,748,508)
Amortization of property and equipment	108,524	102,658
Amortization of intangible assets	1,166	1,457
	(3,574,956)	(2,272,419)
Changes in non-cash working capital components		
Increase in		
Prepaid expenses and other receivables	(99,973)	(72,425)
Increase (decrease) in		
Accounts payable and accrued liabilities	(233,098)	(723,332)
Deferred donations	—	(731)
Scholarships, fellowships and mentorships payable	24,288	(1,050,285)
	(308,783)	(1,846,773)
	(3,883,739)	(4,119,192)
Investing activities		
Purchase of investments at fair value	(26,582,405)	(97,059,209)
Proceeds on disposal of investments at fair value	30,597,127	100,535,220
Purchase of property and equipment	(116,313)	(32,906)
	3,898,409	3,443,105
Net change in cash and cash equivalents during the year	14,670	(676,087)
Cash and cash equivalents – Beginning of year	766,865	1,442,952
Cash and cash equivalents – End of year	781,535	766,865

Notes to Financial Statements

AUGUST 31, 2019

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. On May 31, 2014, the Foundation continued under Section 211 of the Canada Not-for-Profit Organizations Act. The Foundation has been a registered charity under the Income Tax Act since January 22, 2003.

The Foundation is an independent and non-partisan charity established in 2001 as a living memorial to the former prime minister. In 2002, with the support of the House of Commons, the Government of Canada endowed the Foundation with the Advanced Research in the Humanities and Human Sciences Fund. The Foundation also benefits from private donations. By granting doctoral scholarships, awarding fellowships, appointing mentors and holding public events, the Foundation encourages reflection and action in four critical areas important to Canadians: human rights and dignity, responsible citizenship, Canada and the world, and people and their natural environment.

2. Significant accounting policies

Financial instruments

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 and investments at fair value 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 the statement of revenues and expenses when they occur.

Prepaid expenses 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 assets’ short term maturity.

Accounts payable and 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 liabilities’ short-term maturity, except for certain long-term liabilities which are recorded at the discounted value at initial recognition.

Management estimates

The preparation of financial statements in conformity with Canadian accounting standards for not-for-profit organizations (ASNPO) 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 a major financial institution and balances in the investment portfolios.

Revenue recognition

Donations

The Foundation uses the deferral method of accounting for donations. Restricted donations are recognized as revenue in the year in which the related expenses are incurred. Unrestricted donations are recognized as revenue when received or receivable if the amount to be received can be reasonably estimated and collection is reasonably assured.

Gains and losses on disposal of investments at fair value

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

Scholarship, Fellowship and Mentorship programs

Scholarships, fellowships and mentorships 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 these programs are multi-year commitments, changes in amounts committed are adjusted in the year in which 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 at the following rates:

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

Leasehold improvements are amortized on a straight-line basis over the ten-year term of the lease ending September 30, 2023.

Artwork is not amortized because the useful life is virtually unlimited.

Intangible assets

Intangible assets consist of computer software and software development costs, which are recorded at cost and amortized at a rate of 20%.

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

3. Capital disclosures

As at August 31, 2019, the Foundation's capital structure consists of a \$125,000,000 Endowment Fund granted in perpetuity by the Government of Canada in 2002 (note 9), internally restricted assets of \$11,564,190 (2018 – \$11,976,595) (note 10), net assets invested in property and equipment and intangible assets of \$549,547 (2018 – \$542,924) (notes 5 and 6) and unrestricted net assets of \$2,131,645 (2018 – \$2,091,693) (note 11).

The funding agreement with the Government of Canada on the Advanced Research in the Humanities and Human Sciences Fund stipulates that the original endowment may not be spent, but that the income generated may be used for the Foundation's purposes. Accordingly, the Foundation manages its capital with the objectives of:

- preserving the original 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.

4. Investments at fair value

In 2017, the Foundation developed a new Statement of Investment Policies and Procedures consistent with the current directives of the Minister of Finance on endowment investment, which was approved by the Department of Finance on March 28, 2017. The Foundation started transitioning its portfolios shortly after investment guidelines, included in the funding agreement with the Government of Canada on the Advanced Research in the Humanities and Human Sciences Fund, were amended on July 18, 2017. Like other organizations endowed by the Government of Canada, the Foundation will now be allowed to manage the fund according to a diversified investment policy. Given the greater complexity of the portfolio and the limited administrative capacity of the Foundation, the Finance and Investment Committee used delegated investment services to assist the Foundation in the transition. A phased implementation plan over five quarters starting August 1, 2017 was completed on December 31, 2018. According to this plan, securities held in the Foundation's two investment portfolios were liquidated between August 21, 2017 and August 24, 2017. The proceeds from the disposal were temporarily reinvested in bond market securities before they were gradually re-invested in fixed-income securities, equities and alternative assets according to the new investment policy.

Under the Statement of Investment Policies and Procedures, the Foundation is required to invest in a diversified portfolio whereby invested fixed income securities must be rated no lower than Standard & Poor's equivalent rating of "BBB" from at least two of the four main credit rating agencies.

In accordance with ASNPO, investments at fair value are presented as "long-term assets" because pooled funds do not have maturity dates.

	2019 \$	2018 \$
Short-term investments pooled fund	3,381,525	4,030,311
Canadian bond pooled fund	48,277,390	46,664,740
Canadian equity pooled fund	10,496,659	82,763,261
Global equity pooled fund	70,216,890	11,015,736
Alternative assets fund	11,405,660	–
	143,778,124	144,474,048

5. Property and equipment

			2019	2018
	Cost \$	Accumulated amortization \$	Net \$	Net \$
Office communication equipment	49,741	36,408	13,333	16,668
Furniture and fixtures	159,353	115,695	43,658	23,057
Computer equipment	152,749	120,804	31,945	27,486
Leasehold improvements	884,518	518,490	366,028	450,875
Artwork	18,183	–	18,183	18,183
	1,264,544	791,397	473,147	536,269

6. Intangible assets

			2019	2018
	Cost \$	Accumulated amortization \$	Net \$	Net \$
Computer software	62,051	57,387	4,664	5,829
Software development costs	70,910	—	70,910	—
	132,961	57,387	75,574	5,829

7. Deferred donations

Deferred donations consist of restricted donations that will be used to cover charges related to special initiatives.

	2019 \$	2018 \$
Balance – Beginning of year	238,079	238,810
Less: Amount recognized as revenue during the year	—	731
Balance – End of year	238,079	238,079
Current portion of deferred donations	—	—
Long-term portion of deferred donations	238,079	238,079
	238,079	238,079

8. Long-term liabilities

a) Scholarships payable

	2019 \$	2018 \$
Current portion of scholarships payable	1,643,490	1,327,398
Long-term portion of scholarships payable in years ending		
August 31, 2020	—	1,174,048
August 31, 2021	1,219,441	543,926
August 31, 2022	422,092	—
	1,641,533	1,717,974
	3,285,023	3,045,372

b) Fellowships payable

	2019 \$	2018 \$
Current portion of fellowships payable	690,267	857,507
Long-term portion of fellowships payable in years ending		
August 31, 2020	—	312,135
August 31, 2021	340,335	94,121
August 31, 2022	119,858	—
	460,193	406,256
	1,150,460	1,263,763

c) Mentorships payable

	2019 \$	2018 \$
Current portion of mentorships payable	135,762	147,001
Long-term portion of mentorships payable in years ending		
August 31, 2020	–	124,854
August 31, 2021	34,033	–
	34,033	124,854
	169,795	271,855

Non-cash interest expenses included in program expenses bearing interest at a rate of 1.41% (2018 – 2.04%), calculated using the effective interest rate method, are as follows:

	2019 \$	2018 \$
Scholarship Program	75,911	59,859
Fellowship Program	24,540	22,910
Mentorship Program	2,705	3,975
	103,156	86,744

9. Net assets restricted for endowment purposes

In March 2002, the Foundation entered into a funding agreement with the Government of Canada whereby the Government granted an endowment of \$125,000,000 to the Foundation for the purpose of establishing the Advanced Research in Humanities and Human Sciences Fund. In the event of a default by the Foundation, the Government of Canada may terminate the funding agreement and require the Foundation to repay funds not otherwise committed. According to the funding agreement, the endowment bears no interest and must be capitalized in perpetuity.

10. Internally restricted net assets

The Foundation's Board of Directors restricts a portion of the excess of revenues over expenses in any given year, in order to protect the endowment as described in note 3. More precisely, the Board decided that an annual amount of \$1,875,000 would be restricted and capitalized. When the results of a fiscal year are deficient, the Board will not capitalize any amount.

In the year ended August 31, 2019, the Foundation ended the year with excess of expenses over revenues of \$(365,848) (2018 – excess of revenues over expenses of \$563,562) and as a result, did not capitalize an amount to internally restricted net assets (2018 – \$1,311,752).

As at August 31, 2019, the internally restricted net assets amounted to \$11,564,190 (2018 – \$11,976,595).

11. Unrestricted net assets

Unrestricted net assets are the sum of all excess revenues over expenses accumulated over the years after deducting net assets invested in property and equipment and intangible assets, and after deducting all internally restricted funds.

The Private Donation Fund consists of private donations received by the Foundation, net of Outreach, development and other costs (note 16), plus investment revenues generated by the donations, net of investment management costs. The Private Donation Fund is distinct from the Endowment Fund and is not subject to the funding agreement with the Government of Canada (note 16).

Since the year ended August 31, 2017, unrestricted net assets have been sourced exclusively from the Private Donation Fund.

As at August 31, 2019, unrestricted net assets amounted to \$2,131,627 (2018 – \$2,091,693).

12. Financial instruments

Liquidity risk

Liquidity risk is the risk that the Foundation will encounter difficulty in meeting obligations associated with its financial liabilities. The Foundation is potentially subject to credit risk through its accounts receivable, advances to scholars and its investments.

The Foundation holds investments in Canadian and global bond pooled funds and reduces the credit risk by dealing with creditworthy counterparties as described in note 4. The Finance and Investment Committee monitors these investments for credit risk on an ongoing basis.

As at August 31, 2019, management does not believe the Foundation is exposed to significant credit risk.

Market risk

Market risk is the risk that the fair value or future cash flows of a financial instrument will fluctuate because of changes in market prices. Market risk comprises three types of risk: currency risk, interest rate risk and other price risk. The Foundation is exposed to currency risk and to interest rate risk.

a. Currency risk

Currency risk is the risk that the fair value or future cash flows of a financial instrument will fluctuate because of changes in foreign exchange rates. Currency risk arises when financial assets or financial liabilities are denominated in a currency other than the Foundation's functional currency.

The Foundation is exposed to currency risk, as transactions with suppliers outside Canada are predominantly denominated in US dollars.

b. Interest rate risk

Interest rate risk is the risk that the fair value or future cash flows of a financial instrument will fluctuate because of changes in market interest rates. The Foundation is exposed to interest rate risk on its fixed and floating interest rate financial instruments. Fixed interest rate instruments subject the Foundation to fair value risk, while floating rate instruments subject it to cash flow risk. The Foundation's exposure to interest rate risk is as follows:

Cash and cash equivalents	Floating rate
Investments at fair value	Fixed rates
Prepaid expenses and other receivables and all liabilities	Non-interest bearing

13. Commitments

- a. The maximum amounts committed to research, travel and networking are related to scholarship cohorts 2015 and 2016 for their fourth-year allowances and to all 2017, 2018 and 2019 cohorts – scholarships, fellowships and mentorships – which, unlike previous cohorts, can no longer defer their unspent allowances (note 14).

		\$
Years ending August 31,	2020	1,296,157
	2021	1,120,707
	2022	595,000

- b. Future minimum rental payments under office and equipment operating leases and other contractual engagements for the next five years are as follows:

		\$
Years ending August 31,	2020	235,000
	2021	222,000
	2022	214,000
	2023	213,000
	2024	18,000

The Foundation's office lease ends on September 30, 2023.

14. Public Interaction Program

The Public Interaction Program ("PIP") brings together all the Foundation's current and past awardees: Scholars, Fellows and Mentors. The program supports their engagement to discuss issues in the four priority areas identified by the Foundation. The annual budget for the PIP is approved by the Board of Directors at its spring meeting. The program has two distinct components:

- a. Research, travel and networking expenses consist of allowances granted to program beneficiaries – Scholars, Fellows and Mentors – to work together on joint projects, participate in the Foundation's

events and disseminate their research findings and ideas. Research, travel and networking expenses incurred by the program beneficiaries are reimbursed in accordance with Foundation policies set out in the PIP documentation.

To support the Foundation's continuous effort to play a more active role on issues of importance to Canada and the world, program beneficiaries were previously offered the opportunity to use their allowance to participate in the PIP beyond the formal term of their award. This was effective for the 2015 and 2016 Scholar cohorts and the 2014 to 2016 Fellow cohorts. In 2017, this practice was discontinued and was not offered to 2017 Scholar, Fellow and Mentor cohorts.

In 2019, the Foundation awarded 20 scholarships, 5 fellowships and 7 mentorships (2018 – 15 scholarships, 4 fellowships and 10 mentorships).

- b. The PIP also provides financial and logistical support for a series of events and activities, initiated by the Foundation or organized in partnership, including the *Institutes of Engaged Leadership* and *Future Forums*, that aim to provide opportunities to generate knowledge, learn and exchange ideas:

	2019 \$	2018 \$
Research, travel and networking	779,256	605,851
Events and other activities	287,802	313,917
	1,067,058	919,768

15. Donations

	2019 \$	2018 \$
Donations received during the year	143,535	114,878
Less: Donations deferred during the year (note 7)	–	–
	143,535	114,878
Plus: Amount recognized as revenue during the year (note 7)	–	731
Donation income for the year	143,535	115,609

Donations made by directors, members, officers and related parties totalled \$116 for the year ended August 31, 2019 (2018 – \$550).

16. Schedule of expenses

	Program planning and delivery		Administration		Outreach, development and other		Total	
	2019 \$	2018 \$	2019 \$	2018 \$	2019 \$	2018 \$	2019 \$	2018 \$
Salaries and benefits	1,063,394	979,279	129,428	106,656	77,328	333,038	1,270,150	1,418,973
Professional fees	192,283	1,200	130,648	463,749	22,977	52,356	345,908	517,305
Rent and occupancy costs	162,023	178,298	19,720	20,040	11,782	2,003	193,525	200,341
Office expenses	53,381	61,887	6,497	6,956	3,882	695	63,760	69,538
Amortization of property and equipment	84,750	91,366	10,315	10,266	6,163	1,026	101,228	102,658
Amortization of intangible assets	910	1,297	111	146	66	14	1,087	1,457
Bank charges	(208)	4,262	(25)	477	(15)	50	(248)	4,789
Meetings and travel	11,379	—	84,916	73,717	987	—	97,282	73,717
Outreach and communications	5,167	32,473	—	—	12,538	22,823	17,705	55,296
Recruitment costs	—	—	29,936	114,621	—	—	29,936	114,621
Other employee expenses	—	—	24,493	5,772	—	—	24,493	5,772
Administration expenses covered by Private Donation Fund	—	—	(230,000)	(370,000)	230,000	370,000	—	—
	1,573,079	1,350,062	206,039	432,400	365,708	782,005	2,144,826	2,564,467

To reflect the charitable mandate of the Foundation, expenses are distributed between Program planning and delivery, Administration and Outreach, development and other.

Program planning and delivery and Administration are covered by the Endowment Fund, while Outreach, development and other costs are covered by the Private Donation Fund (note 11).

Investment management costs of \$303,229 (2018 – \$322,393) are covered by the Endowment Fund and represent investment counsel fees as well as an allocation of costs related to the governance and oversight of matters involving the Fund and the Statement of Investment Policies and Procedures.

In 2019, an amount of \$230,000 (2018 – \$370,000) was drawn from the Private Donation Fund to cover expenses in excess of the ceiling on operating costs imposed by the Foundation's funding agreement with the Government of Canada. This transfer followed a decision that for the fiscal years ending August 31, 2018 and 2019, such expenses might be covered by the Private Donation Fund at year-end.

17. Comparative figures

Certain comparative figures have been reclassified to ensure consistency with the current year's presentation.