

Annual Report 2019 – 2020

DISCOVER
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CHANGE





The Pierre Elliott Trudeau Foundation Annual Report 2019-2020

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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
T: 514-938-0001

info@trudeaufoundation.ca
www.trudeaufoundation.ca

 @fdnPETF
 @fdn_pierre_elliott_trudeau
 @fondationtrudeaufoundation
 /company/fondation-trudeau-foundation

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01.



The Foundation



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 by 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.



By the numbers

Since its inception, the Foundation has served to support academic excellence and leadership:

267
SCHOLARS

Supporting some of the brightest minds in Canada and around the world

79
FELLOWS

Promoting the research and creativity of Canada's top intellectuals and academic mentors

153
MENTORS

Connecting eminent Canadians to our Scholars



Our Mission

We empower Scholars to have meaningful impact in the world

From the beginning, the Foundation has recognized and valued academic excellence and leadership across industries. The Foundation supports Scholars who are committed to translating ideas into action for the betterment of their communities, Canada, and the world – a quality that lies at the heart of the Foundation's leadership development program.

THE FOUNDATION



FONDATION
PIERRE ELLIOTT
TRUDEAU
FOUNDATION

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02.



Message from the Chair

Patrick Pichette

CHAIR OF THE BOARD OF DIRECTORS



2020 was a year of challenges and achievements for which we stand proud.

Despite our various challenges, the Foundation has continued to deliver on its original promise, and, bolstered by its new five-year strategic plan, has pushed ahead in its mission to nurture and support Canada's next generation of leaders through the lens of Engaged Leadership and Inclusive Excellence. Our strategy charts a clear path forward as we look beyond the long reach of this pandemic. Now more than ever, Canada will need Engaged Leaders able to steer our country, and our world, in new directions.

Among the many changes in its operating model, I am proud to report that the Foundation has reset the way in which it chooses its Scholars, introducing an upgraded, more thoughtful, thorough, and more data-guided process supported by invaluable guidance and contributions from the Foundation's Members and Directors, its Application and Nomination Review Committee, as well as the community-led Advisory Committee on Diversity. Through

these collaborative approaches, the way Scholars are now selected will better reflect a broader range of fields of research, and perspectives to the Foundation.

As Chair of the Board of Directors, I am especially proud to say that in addition to seeking Scholars with outstanding intellectual capacity, we are going further in our quest to identify those who are committed to other crucial leadership attributes, such as deep listening, profound curiosity, the exploration of grey zones, and a willingness to engage with a diversity of people, cultures, ideologies, and perspectives. The Foundation's *Brave Spaces*, built around empathy and mutual respect, are about fostering dialogue from multiple perspectives, a key step in the development of Engaged Leaders.

Anchored by our original Four Themes, Human Rights and Dignity; Responsible Citizenship; Canada and the World; and, People and their Natural Environment, the Foundation is doubling down on its commitment to fostering



meaningful change in institutions and communities.

Today we are witnessing a proliferation of monolithic approaches (read: echo chambers) based on intransigent viewpoints that have no hope of bringing positive and meaningful solutions to the emerging or increasingly exposed challenges faced by a society as diverse as ours. To understand and lead the systems that can ultimately bring social change, we must engage with a plurality of perspectives by diving deep into those grey zones. Those who fail to do so will be forever condemned to the front steps of the very institutions they have the promise to otherwise change from within.

The Foundation has done a commendable job adjusting to the unpredictability of the

past year. Our Foundation showed courage in delivering its unique brand of leadership training via virtual platforms, rather than through our traditional in-person events. As we continue to grapple with exceptionally challenging circumstances, the stage is set for the Foundation to live up to its core values of accountability, community, and impact in new and innovative ways that will ultimately help us find creative solutions to the increasingly complex problems of our times.



Patrick Pichette
Chair, Board of Directors

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03.



Message from the President

Pascale Fournier Ad.E, Ph.D. Harvard University
 PRESIDENT AND CHIEF EXECUTIVE OFFICER
 2003 SCHOLAR



Our Foundation's community has come together during the COVID-19 crisis, our mission to empower Scholars as Engaged Leaders being more relevant now than we could have imagined.

This year has been an unprecedented time of loss, change, realization, and opportunity. The COVID-19 pandemic has affected our lives in profound ways and its shadow will continue to follow us for some time. We continue to learn much about ourselves, others, and the fallibility of our systems and institutions; however, one fact is clear: the way forward will be a journey fraught with new challenges and, at the same time, marked by remarkable opportunities to rebuild, improve, and grow.

It is my honour to present the Pierre Elliott Trudeau Foundation's 2019-2020 Annual Report, a look back at a year that has been exceptional in so many ways. The Foundation and its community of Scholars, Fellows, and Mentors has persevered through innovation, adaptation, and focus. Driven by our commitment to supporting leading Scholars on their journey to becoming the Engaged Leaders of the future, we took dramatic steps to redesign our leadership programs to a reality in which in-person gatherings were restricted, moving to virtual platforms designed to offer our Scholars the same important training in new and different ways.

The pandemic has caused a great deal of human tragedy, a point that we must always keep top of mind in the torrent of statistics related to the virus and its far-reaching effects.

Through the trials and disruptions of this experience, we have learned hard lessons about isolation and loss. At the same time, we are learning new ways to approach and express knowledge, empathy, and passion.

The Foundation's Scholarship program is, more than ever before, a vital and unique incubator for the Engaged Leadership that will help blaze the trail to a society that is stronger, safer, and more just. Our leadership curriculum, built around a scientific theme, is tailored to the needs of each cohort of Scholars and focuses on the fundamentals: leadership of self, leadership among others, and leadership of systems. Through this model, we guide future leaders to move beyond echo chambers and into the grey zones of the world they must navigate. The Foundation's *Brave Spaces*, discursive spaces characterized by accountability and purpose, place an emphasis on bringing together a plurality of perspectives.

Now, more than ever, enacting positive change in the world requires trust. There is no better way to build trust than through learning and listening, including through engagement with people and perspectives with which we disagree. These sometimes challenging discussions are necessary to pave the way forward, to see nuance and recognize shades of grey. Leadership and trust go hand in hand.



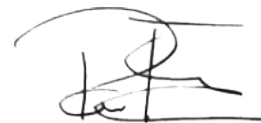
Over the course of the last year, the Foundation has trusted, first and foremost, its community. Through our virtual programming, not only did we showcase the talents and expertise of our exceptional community members who are active, we also engaged our alumni in new ways, regularly featuring alumni Scholars, Fellows, and Mentors in webinars on a range of subjects. Further, the Foundation created the COVID-19 Impact Committee, which includes leaders from a range of fields who contributed to the national conversation regarding the pandemic through a series of publications with media partners *The Toronto Star* and *La Presse*. Meanwhile, the newly appointed Advisory Committee on Diversity has played a central role advising on many issues including the social injustices exacerbated by the pandemic.

Our programs, whether delivered through in-person events or on virtual platforms, support real change by accompanying our Scholars' development, so they acquire skills to get past the doorstep of our institutions and bring positive change from within. In the words of Canada's former Governor General, and esteemed Foundation Member, the Right

Honourable David Johnston, from his recent book *Trust: Twenty Ways to Build a Better Country*: "Knowing there is more than one way to get where we all want to go enables us to remain united, encourages us to work together, and engenders trust."

The pandemic and its profound effects have taught us that we can never assume what the future has in store. This year has been a turning point for us all in significant ways. Yet, as the Foundation continues in its commitment to the development of future leaders, its mission is more relevant now than ever before.

As we look at the year ahead, we are even more steadfast in our commitment to developing and supporting the Engaged Leaders whom we trust will convert their knowledge, skills, and expertise into concrete results that will help us achieve a more just and diverse society for all.



Pascale Fournier

President and Chief Executive Officer

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04.

Strategic Plan 2019–2024



Our Strategic Plan

Following from our *Future Forums* listening and learning tour in 2018-2019, an independent evaluation and a thorough analysis and discussion of the Foundation's environment, history and community, the Foundation's Board of Directors ratified a new five-year strategic plan for 2019-2024.

On January 17, 2020, the Foundation unveiled the contents of its strategic plan to its community and the public. The strategic plan, which draws from the inspirational themes of **Inclusive Excellence** and **Engaged Leadership**, comes as a paradigm shift is unfolding in the milieu of academic research. In our current and constantly evolving context, excellence in research can only be attained if certain best practices are put forward by the researchers themselves and the institutions that train them. Outstanding research must not only serve a purpose, but it must also respond to new realities—whether intellectual, social, cultural, technological, environmental, or economic—with the participation of communities across Canada and around the world.

In this context of collaboration, emerging researchers must grow to exhibit and apply qualities such as active listening, humility, creativity, self-awareness, courage, and inclusiveness. It is emotional intelligence and lived experiences which lend meaning and depth to research. Great researchers also recognize and value different knowledge sources such as oral traditions, hands-on knowledge and experiential learning approaches because they understand that, in order to solve real-world problems, it is important to resort to other ways of thinking and doing.



Our Vision

Being an international model for leadership training among academics

The Foundation bridges the gap between academic and applied knowledge through its innovative and impactful programming and its growing community of intellectuals and leaders.

The Foundation is a catalyst for meaningful change thanks to the following attributes:

Our vibrant, enthusiastic network of Scholars, Fellows, Mentors, and Alumni

Our smart, caring community reflects Canada's richness in terms of diversity and ideas

Our prestigious Scholarships attract world-class researchers and help empower them to have a positive impact in the world



Inclusive Excellence and Engaged Leadership

In 2018, the Foundation undertook an eight-month pan-Canadian listening and learning tour called the *Future Forums*. This consultation was spurred by the need to reimagine the programming the Foundation offers to address the needs of its Scholars for the 21st century. The *Future Forums* were an opportunity to engage with community stakeholders, including academic partners, alumni and active members of the Foundation community, corporations, governments, and NGOs.

The conclusions which were drawn from the *Future Forums* informed the development of our *Strategic Plan 2019-2024*, the key tenets of which are a focus on Inclusive Excellence and fostering Engaged Leadership among the Foundation's Scholars.

Inclusive Excellence

To achieve the highest standards of excellence, we believe that different knowledge systems must be included and valued. The concept of Inclusive Excellence encapsulates our firm commitment to building a diverse community of Scholars, Fellows, Mentors, Members, Directors, and staff, while maintaining the highest expectations of excellence. This includes diversity in terms of gender, race, disability, language, socioeconomic background, Indigenous knowledge, and region of origin.

The Foundation is equally committed to nurturing a plurality of perspectives within its community. We believe that greater diversity and exposure to a plurality of peoples, cultures, and ideologies brings excellence by broadening one's understanding of the world, encouraging dialogue and engagement across difference, ultimately fostering creativity and innovation. These factors also contribute to improving research and advancing healthy public debate.

Engaged Leadership

While leadership is often considered a hallmark that belongs to the worlds of politics and business, in truth, we are surrounded by leaders who work every day toward the advancement of our communities, our universities, and our institutions. Engaged Leaders may fit within traditional hierarchies, but are set apart by qualities such as strong social intelligence, collaborative spirit, openness to change, and a commitment to including a multiplicity of voices in order to arrive at a potentially new and different destination.

Public intellectuals who embody the best qualities of Engaged Leadership also demonstrate characteristics such as active listening, humility, self-awareness, courage, and inclusivity. The subtle and refined views these sophisticated intellectuals bring through their work make them nuanced and impactful leaders.

“Our flourishing—and even survival—depends more than ever on engaging our full breadth of experiences and perspectives. We must learn to think critically about our most closely held beliefs, to consider generously those most distant from our own, and to discern, disarm, and de-pedestalise the most harmful of these, while exiling no one.”

Danielle Peers, Ph.D.

2011 SCHOLAR
ASSISTANT PROFESSOR IN KINESIOLOGY,
SPORT, AND RECREATION
UNIVERSITY OF ALBERTA



“By focusing on Engaged Leadership, we are investing in the belief that Pierre Elliott Trudeau Foundation Scholars have a vital role to play beyond the academy. Our job, as Mentors and Fellows over three years, is to help each cohort gain the tools they need to engage their communities – populations that are likely to represent a wider range of priorities than the colleagues and the students with whom they will work on campus.”

ROB STEINER

2019 MENTOR
HOST OF THE 2020 WEBINAR
SERIES: *EMERGENCE*

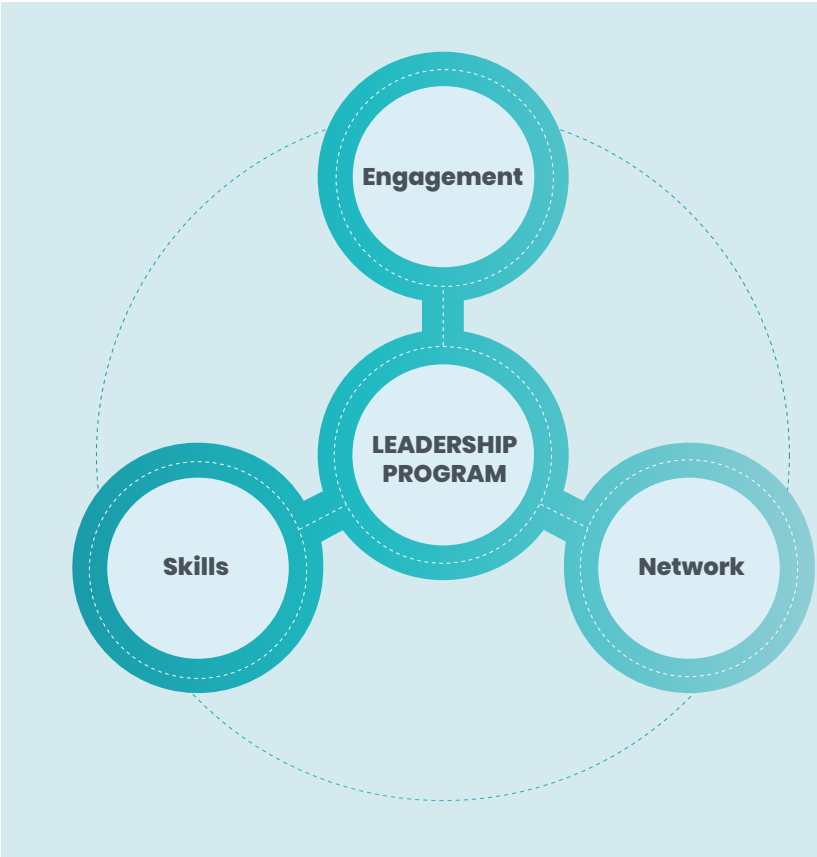
Robert Steiner is Director of the Dalla Lana Fellowship in Global Journalism at the Dalla Lana School of Public Health Sciences at the University of Toronto. His career in journalism included writing as a global finance correspondent for *The Wall Street Journal*, with postings in New York, Hong Kong and Tokyo. He has won two Overseas Press Club awards, the Inter-American Press Association Award, and was a finalist for the Pulitzer Prize. He has also served in a number of strategic positions in Canadian politics.



The Leadership Program

The Foundation’s unique leadership curriculum builds on Scholars’ existing skills and strengths, offering opportunities that are stimulating and challenging, and that deliberately move Scholars beyond their comfort zone. This approach presumes that all have room to grow as leaders and must work to nurture healthy relationships with self, others, society, and the natural world. One does so in the pursuit of imagining and building a shared future, including with those who hold differing opinions and goals. This is the path that our Leadership Program sets out for Pierre Elliott Trudeau Foundation Scholars.

Our renewed three-year program empowers Scholars to have meaningful impact in the world by providing leadership training and tools to share and apply their research.



Scientific Cycle

The Leadership Program builds on Scientific Cycles. Through our unique model, the three-year leadership journey of each cohort of Scholars is contextualized by a scientific theme that has interdisciplinary dimensions and reflects a timely and significant issue, or set of issues, for the future of Canada and the world. The Scientific Cycle provides a backdrop throughout each Scholar’s tenure, encouraging reflection beyond their expertise and development of their engagement with people, issues, and ideas typically outside their academic training. It provides the lens through which the Foundation’s four fundamental themes are explored.

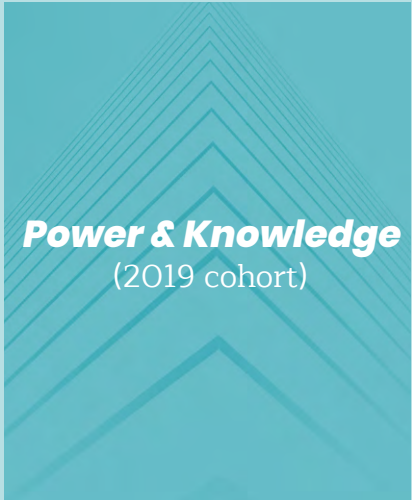
Guided by our Members and Directors, the Foundation has launched the following Scientific Cycles for its 2019 and 2020 cohorts:

2019–2022 Power and Knowledge

The 2019–2022 Scientific Cycle of the Foundation focuses on the dynamic relationship between power and knowledge in various situations of social injustices in Canada and internationally. Understanding power-knowledge relationships and the roots of power imbalances is essential to changing situations of social injustices. This theme was explored at our first *Institute of Engaged Leadership* in Yellowknife, NWT and in virtual events over the summer of 2020.

2020–2023 Technology and Ethics

The 2020– 2023 Scientific Cycle explores ethical and social issues raised by contemporary technologies, especially in the areas of biotechnology and artificial intelligence. The core questions steering this Scientific Cycle include: How is humanity shaped by advances in these areas, and, in turn, how can we shape them on the basis of ethical principles?



Brave Spaces

Through its programs, the Foundation creates *Brave Spaces* designed to encourage dialogue across difference and foster open debate, while respecting diversity. Our *Brave Spaces* are accountable and democratic, valuing difference with the expectation that participants share their experience while developing new understanding. In this model of dialogue and collaboration between diverse forms of knowledge and lived experiences, one accepts to take risks as one takes a journey down paths that may feel uncomfortable, but at the same time prompt creativity, freedom, and greater understanding.



05.



Engagement of the Community



The engagement of our Scholars, Fellows, Mentors, and Alumni in the life and orientation of the Foundation sets us apart from other granting organizations. We rely on their expertise and experience to create a responsive environment that can promote ideals in an inclusive and positive manner.

Strategic Advisory Committee: Drawing from the wisdom of our Community

The Strategic Advisory Committee was composed of members of the Foundation's community of Scholars, Fellows, and Mentors. It was appointed in June 2019 to advise and guide the development of the Foundation's *Strategic Plan 2019-2024*, complementing the work of the Directors and Members of the Foundation. The Committee was dissolved upon the adoption of the strategic plan in December 2019.



Robert Steiner

2019 Mentor
Committee Role: Chair



Dyane Adam, Ph.D.

2008 Mentor
Committee Role: Member



Daniel del Gobbo

2017 Scholar
Committee Role: Member



Karen Bakker, Ph.D.

2017 Fellow
Committee Role: Member



Malinda Smith, Ph.D.

2018 Fellow
Committee Role: Member



Carlo Charles

2019 Scholar
Committee Role: Member



Rita Karakas

2019 Mentor
Committee Role: Member



Shannon Litzenberger

2019 Mentor
Committee Role: Member



Marie Battiste, Ph.D.

2019 Fellow
Committee Role: Member

Strategic Advisory
Subcommittee

First appointed by the Board of Directors in 2020, and chaired by Thomas Axworthy, this committee is composed of Members and Directors with academic backgrounds who advise the Foundation on the development of themes for its Scientific Cycles. Not only does the committee assess and discuss themes for the next cycle, but their discussions also contribute to a longer-term mapping of critical themes that will be important to Canada and the world for decades to come.



Thomas Axworthy, Ph.D.
Member
Committee Role: Chair



John English, Ph.D.
Member
Committee Role: Member



Marc Renaud, Ph.D.
Director
Committee Role: Member



Sean Riley, Ph.D.
Member
Committee Role: Member



Alexandre Trudeau
Member
Committee Role: Member



Jennifer Welsh, Ph.D.
Director
Committee Role: Member

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COVID-19 Impact Committee

With the creation of the COVID-19 Impact Committee, the Foundation promotes the knowledge, expertise, and voices of our community in the public realm through partnerships with mainstream media organizations. The committee is composed of active and alumni members of the Foundation who are Canada’s leading thinkers in various disciplines, including bioethics, public and global health, Canadian and international law, human rights, Indigenous child and family welfare, arts, and migration studies. As of August 31, 2020, the Committee was working towards a Declaration on the social and ethical implications of COVID-19 as a guide to the global response to the pandemic from the perspective of those in the Social Sciences and Humanities.



Vardit Ravitsky, Ph.D.
2020 Fellow
Committee Role: Chair



Cindy Blackstock, Ph.D.
2012 Mentor
Committee Role: Member



Nathalie Bondil
2018 Mentor
Committee Role: Member



Timothy Caulfield, Ph.D.
2013 Fellow
Committee Role: Member



Carlo Charles
2019 Scholar
Committee Role: Member



Jocelyn Downie, Ph.D.
2015 Fellow
Committee Role: Member



Bernard Duhaime, Ph.D.
2017 Fellow
Committee Role: Member



Steven Hoffman, Ph.D.
2012 Scholar
Committee Role: Member



Mohammad Karamouzian
2018 Scholar
Committee Role: Member



The Right Honourable Beverley McLachlin
2020 Mentor
Committee Role: Member



Eric Meslin, Ph.D.
2020 Mentor
Committee Role: Member



André Picard
2018 Mentor
Committee Role: Member

Publications and articles by members of our COVID-19 Impact Committee:

Toronto Star

- Translating pandemic data into lessons learned*, Eric Meslin
- Inequality means we’re not all in this together*, Mohammad Karamouzian
- Writing the story of COVID-19: why investing in public health matters*, Steven Hoffman
- Pandemic has exposed Canada’s mistreatment of newcomers*, Carlo Charles
- Return to sport should be about safety, not prizes*, Jocelyn Downie
- Why you should care about access to justice*, Beverly McLachlin
- The COVID-19 ‘infodemic’— Debunking works, if it’s done right*, Timothy Caulfield
- Let’s continue to make the sacrifices we must make — willingly*, Vardit Ravitsky

La Presse

- Protéger les droits humains au temps de la pandémie*, Bernard Duhaime
- Se frayer un chemin à l’aide de la science et de l’éthique*, Eric Meslin, Vardit Ravitsky
- Penser le monde d’après de façon plurielle et intersectionnelle*, Carlo Charles
- La COVID-19 et les protocoles de triage*, Jocelyn Downie
- On ne peut plus ignorer la crise de la justice*, Beverley McLachlin
- On ne peut pas lutter contre la désinformation avec de la mauvaise science*, Timothy Caulfield
- Les impacts sociaux de la COVID : la duplicité du gouvernement en matière de racisme systémique*, Cindy Blackstock
- Les impacts sociaux de la COVID-19: place à la solidarité d’après-crise*, Vardit Ravitsky



CONTRIBUTORS

OPINION

Why you should care about access to justice

By Beverley McLachlin Contributor
Mon., June 29, 2020 4 min. read
Article was updated Jun. 26, 2020

TORONTO STAR

CONTRIBUTORS

OPINION

Translating pandemic data into lessons learned

By Eric M. Meslin Contributor
Thu., Aug. 13, 2020 3 min. read
Article was updated Aug. 12, 2020



CONTRIBUTORS

OPINION

Pandemic has exposed Canada’s mistreatment of newcomers

By Carlo Handy Charles Contributor
Wed., July 15, 2020 3 min. read

CET ÉCRAN A ÉTÉ PARTAGÉ À PARTIR DE LA PRESSE+

Édition du 19 juillet 2020, section DÉBATS, écran 6

On ne peut plus ignorer la crise de la justice

Voici le cinquième d’une série de textes d’opinion sur les effets sociaux à long terme de la pandémie, rédigés par des membres du Comité sur les impacts de la COVID-19 de la Fondation Pierre Elliott Trudeau

Publié le 5 juillet 2020 à 10h00

Les impacts sociaux de la COVID-19: place à la solidarité d’après-crise

Voici le premier d’une série de textes d’opinion sur les effets sociaux à long terme de la pandémie, rédigés par des membres du Comité sur les impacts de la COVID-19 de la Fondation Pierre Elliott Trudeau

Publié le 7 juin 2020 à 10h00

NATHALIE BONDIL
PROFESSEUR DE BIOÉTHIQUE À L'ÉCOLE DE SANTÉ PUBLIQUE DE L'UNIVERSITÉ DE MONTRÉAL
FELLOW 2020 ET PRÉSIDENTE DU COMITÉ SUR L'IMPACT DE LA COVID-19

LA PRESSE

CET ÉCRAN A ÉTÉ PARTAGÉ À PARTIR DE LA PRESSE+

Édition du 19 juillet 2020, section DÉBATS, écran 6

Advisory Committee on Diversity

Institutions and organizations across Canada are being called upon to take meaningful steps to confront and resolve sources of systemic racism and injustice in our society. Considering its commitment to diversity and inclusive excellence, the Foundation formed an Advisory Committee on Diversity, composed of exceptional members of the active and alumni community to guide our actions and decisions as we deliver on the objectives outlined in our *Strategic Plan 2019-2024*. The Foundation is committed to equity and inclusion in creating and nurturing an environment that recognizes and celebrates diversity, a signature characteristic of Engaged Leadership and Inclusive Excellence. We believe that greater diversity encourages better collaboration, openness to difference, creativity, and innovation. These factors contribute to improving research and strengthening mutual understanding. The members of the Advisory Committee reflect all aspects of the Foundation’s definition of diversity and bring curiosity and openness, along with a wealth of professional and personal experience, which fundamentally strengthens the work of the Foundation.



Mary Anne Chambers

2018 Mentor
Committee Role:
Co-Chair



Romeo Saganash

2005 Mentor
Committee Role:
Co-Chair



Magaly Brodeur, Ph.D.

2009 Scholar
Committee Role:
Member



Margarida Garcia, Ph.D.

2004 Scholar
Committee Role:
Member



Randall Harp, Ph.D.

2020 Fellow
Committee Role:
Member



Patti LaBoucane-Benson, Ph.D.

2004 Scholar
Committee Role:
Member



Caroline Leblanc

2019 Scholar
Committee Role:
Member



Bernard Richard

2012 Mentor
Committee Role:
Member



Darren Saunders

2019 Scholar
Committee Role:
Member



Jamie Snook

2017 Scholar
Committee Role:
Member



Charlie Wall-Andrews

2020 Scholar
Committee Role:
Member

Alumni Network

We cherish our ongoing relationship with past Scholars, Fellows and Mentors. The Foundation maintains meaningful ties with alumni, inviting members of this unique community to host and participate in events, sit on strategic committees, and, in some cases, serve on the Board of Directors. The Foundation is committed to maintaining a special connection with alumni and keeping them engaged in Foundation activities in meaningful ways across Canada and beyond.

Reflective of the Foundation’s *Strategic Plan 2019 -2024*, the Executive Committee of the Alumni Network aspires to have a representative balance between anglophone and francophone members, to include Indigenous representation, to maintain gender parity, and to reflect the diversity of the Foundation community. With representation from across Canada as well as international members, the Alumni Executive offers perspectives from different parts of the country and abroad.

In May 2020, the Alumni Executive oversaw the launch of a new Alumni Newsletter. Designed to foster the ongoing relationship alumni have with the Foundation in building a better tomorrow, the newsletter offers intellectual content that is creative, critical, and inclusive as alumni share their knowledge of the present and the past.



Lisa Helps

2006 Scholar
Committee Role:
Co-President



Robert Leckey, Ph.D.

2003 Scholar
Committee Role:
Co-President



Libe García Zarranz, Ph.D.

2010 Scholar
Committee Role:
Member



Jean Lebel, Ph.D.

2016 Mentor
Committee Role:
Member



Steven Loft, Ph.D.

2010 Fellow
Committee Role:
Member



Sophie Thériault, Ph.D.

2003 Scholar
Committee Role:
Member



Graduating Scholars



ENGAGEMENT OF THE COMMUNITY



**Aytak
Akbari-Dibavar**

2016 Scholar
York University



**Samuel
Blouin, Ph.D.**

2016 Scholar
Université de Montréal
Université de Lausanne



**Sébastien
Brodeur-Girard,
Ph.D.**

2016 Scholar
Université du Québec en
Abitibi-Témiscamingue



Heather Bullock

2016 Scholar
McMaster University



**Christopher
Campbell-Durufflé**

2016 Scholar
University of Toronto



**Marie-Ève
Desroches**

2016 Scholar
Institut national de la
recherche scientifique



Anna Dion

2016 Scholar
McGill University



Ido Katri

2016 Scholar
University of Toronto



**Gerard
Kennedy, Ph.D.**

2016 Scholar
York University



Cynthia Morinville

2016 Scholar
University of Toronto



Antoine Pellerin

2016 Scholar
Université Laval



Cherry Smiley

2016 Scholar
Concordia University



Jesse Thistle

2016 Scholar
York University



Pauline Voon

2016 Scholar
University of British
Columbia



**Billy-Ray
Belcourt**

2018 Scholar
University of Alberta



**Alexandra
Mogyoros**

2018 Scholar
University of Oxford



Riley Kucheran

2019 Scholar
Ryerson University

ENGAGEMENT OF THE COMMUNITY

06.

Overview of Programs



Highlights

In 2020, 199 applications were considered for the 2020 Scholarship competition. Canadian nominating universities were invited to submit up to four candidates, while foreign institutions were eligible to submit three candidates. Overall, more than 800 candidates applied for the Scholarship through Canadian and international universities. Interviews with finalists were conducted by the Application and Nomination Review Committee.

The Foundation currently funds 83 Scholars, all of whom are actively engaged in their fields, and thanks to the support we provide are poised to become leading figures within and beyond academia. In 2019-2020, the Foundation invested \$2.0 million in the Scholarship Program (including the travel and networking allowance of \$0.6 million).

In 2020, the Foundation assessed more than twenty Fellow candidates. The Application and Nomination Review Committee screened and interviewed three finalists. Overall, 17 Fellows were active throughout the year as part of our Fellowship Program.

The Foundation appointed seven Mentors in 2020 who will work with Scholars by teaching leadership skills and helping them connect with networks in areas such as policy-making, government, philanthropy, law, business, the arts, and journalism. The Foundation considered more than 50 candidates. Nine finalists were assessed by the Application and

Nomination Review Committee. Thirty-four Mentors were active throughout the year.

In 2019-2020, the Foundation invested \$0.8 million in the Fellowship and Mentorship Programs (including the travel and networking allowance of \$0.1 million).

Doctoral Scholarships

Our doctoral Scholarship in the Social Sciences and Humanities is unique in Canada in its scope and stature. Last year, sixteen scholarships were awarded to Canadian and foreign doctoral candidates pursuing research related to one of the Foundation's four founding themes. Our program provides Scholars with generous funding for their studies in addition to leadership training. This three-year leadership program is designed to train Engaged Leaders, equipping outstanding doctoral candidates with the skills to translate their ideas into action, for the advancement of their communities, Canada, and the world.

Fellowships

Our Fellowship program invites academic experts who are recognized for their research and teaching excellence, a strong commitment to sharing knowledge beyond the classroom, and their innovative approaches when it comes to understanding important issues facing society. Fellows play an active role in the leadership development of our doctoral Scholars, supporting their journey toward becoming the Engaged Leaders of tomorrow.



They fulfill a role 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 various sectors with Scholars and Fellows. Our Mentors focus on the leadership development of Scholars through knowledge sharing and training on key leadership concepts and skills. They act as leadership trainers, guides, and advisors. During the three-year program our Mentors serve as a vital bridge between the research world and the public sphere.

Public Interaction and Leadership Programs

The Foundation’s Public Interaction Program (“PIP”) builds on the expertise of the international network of individuals selected through our three grant-giving programs, providing the Foundation’s community with unique opportunities to learn and exchange ideas and proposals, and to share knowledge with colleagues from various disciplines and backgrounds. PIP comes to life through different formats, including conferences, seminars, workshops, networking events, and publications. In addition, members of the Foundation community are encouraged to organize PIP events and to collaborate with other institutions to promote

understanding of major issues that affect Canadians and global society.

In 2019, the Foundation launched its *Institutes of Engaged Leadership* Program, immersing Scholars in leadership training and introducing them to ideas and experiences they may not otherwise encounter in a university context. This training is led by the Foundation’s Fellows, leaders in research and teaching, and Mentors, leaders and innovators from across the public, private, and non-profit sectors. The Institutes take place in various locations in Canada and abroad, and virtually in the context of the COVID-19 pandemic.



Michael Hawes, CEO Fulbright Canada, and Pascale Fournier



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07.



Public Interaction Program



During the year, the Foundation hosted one *Institute of Engaged Leadership* and one community event and supported several other public events, before the outbreak of COVID-19 in March 2020.

The Foundation held its first ever *Institute of Engaged Leadership* in Yellowknife, NWT from October 27 to November 1, 2019, building on the theme *Power & Knowledge*.

The Foundation hosted a special event, *New Year, New Ideas*, which brought together its community, on January 17, 2020. The main segment was a panel discussion with members of our community who reflected on important aspects of the Foundation's strategic plan.

The Foundation also supported other public events organized by our community or in collaboration with them:

Opening presentation and launch of *Future Forums* report: On September 23, 2019, the President and CEO of the Foundation delivered the opening presentation of the Canada Seminar, a series of talks hosted by the Weatherhead Center for International Affairs at Harvard University. The *Future Forums* report was also launched on this occasion. The event was attended by Scholars and Mentors of the Foundation, as well as Canadians students and faculty at Harvard University.

Special evening at the Quebec Bar Foundation: On October 22, 2019, the Foundation hosted members of its

community at a special evening event with the Quebec Bar Foundation, with Lucien Bouchard and Jean Charest as guest speakers reflecting on their political careers.

Book launch for Jesse Thistle's *From the Ashes*: The event was attended by members of our community.

Networking Luncheon with Fulbright: On January 30, 2020, the Foundation hosted a special luncheon in New York City with officials of the United States Fulbright Program and members of its board of directors in Canada and the U.S. Members of our Alumni Network Executive and community participated in this event which celebrated the new partnership between the Foundation and Fulbright Canada, while providing a platform for stimulating intellectual discussions and networking with special guests that included Ambassador Marc-André Blanchard, Canada's representative to the United Nations.

Inaugural Institute of Engaged Leadership – Yellowknife, NWT

The Foundation held its inaugural Institute in Yellowknife, NWT. Scholars, Fellows, and Mentors came together for a week of leadership training and learning on the theme of *Power & Knowledge* in the context of Canada's North. Through a week of diverse teaching sessions led by our Fellows and Mentors, the Institutes placed an accent on experiential learning for Scholars. Hence, the week included a number of field visits



to locations including the Legislative Assembly of the Northwest Territories, the Arctic Indigenous Wellness Foundation, Food Rescue Yellowknife, and the Hotiì ts-eeda Research Support Centre. Two key highlights of the week were a keynote address by Indigenous leadership and education expert Gabrielle Scrimshaw, and a day-long visit to the Dechinta Centre for Research and Learning, a land-based learning organization which provided an outstanding series of experiences built around Indigenous traditional knowledge and history.

The next Institute was to take place in March 2020 in Washington, DC but was cancelled due to growing concerns surrounding the global COVID-19 pandemic. As a result of travel restrictions, the Foundation adjusted its programming to develop a summer webinar series entitled *From Research to Impact*, featuring public and community-only events.

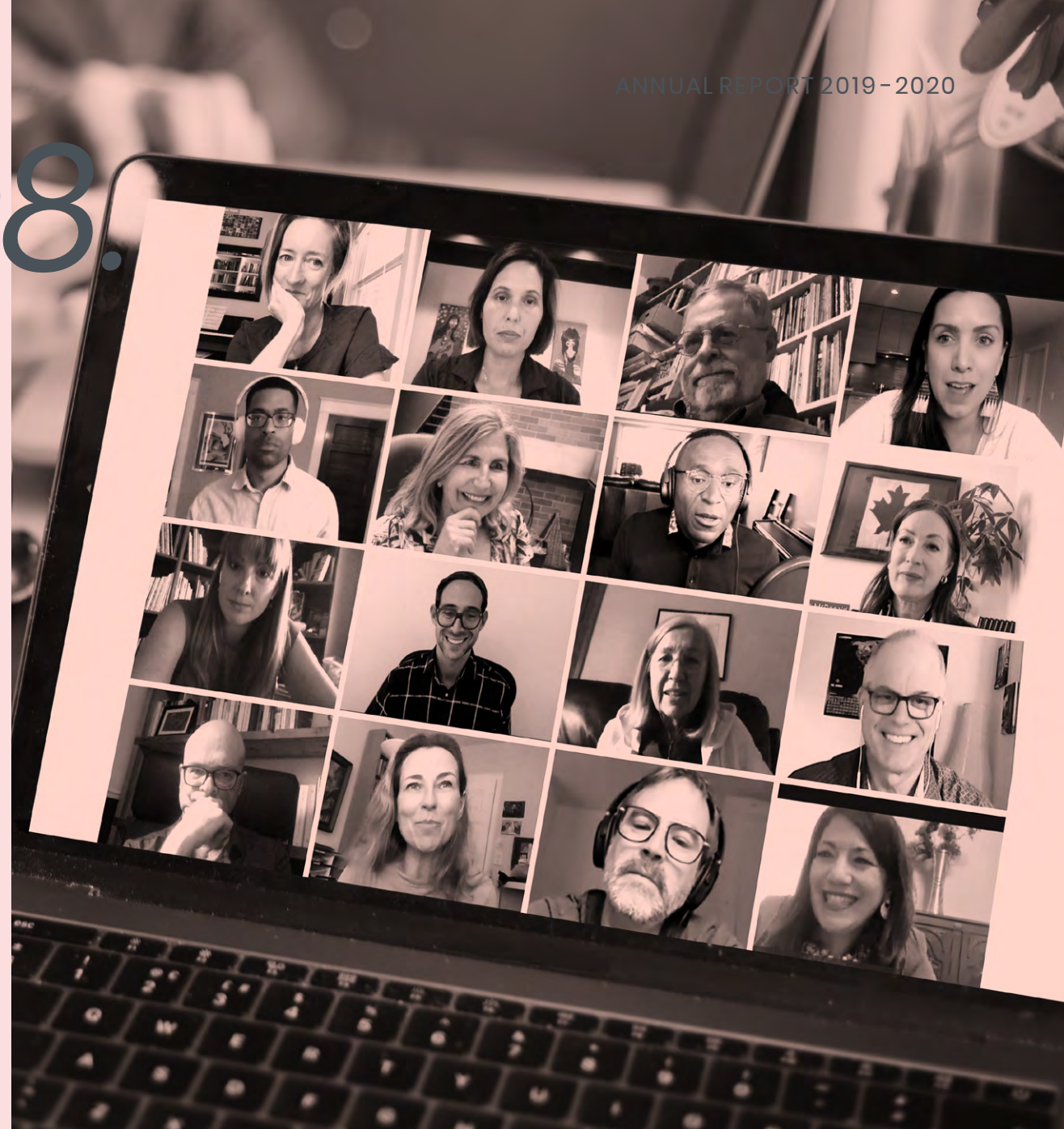


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COVID-19

Highlights

The COVID-19 pandemic obligated the Foundation to call off its March 2020 *Institute of Engaged Leadership* in Washington, DC, including a special reception which was planned at the Canadian Embassy with more than 120 guests and hosted by the acting Ambassador of Canada to the United States. A community retreat in Moncton, NB scheduled for June 2020, as well as several Alumni Network events across the country in the spring and summer of 2020, were also cancelled.

In the early months of the pandemic, the Foundation adjusted by developing alternative online programming, notably our summer webinar series *From Research to Impact*. The series focused on topics such as rights, dignity, and justice amid the pandemic, seeking to build a space to bring our community together by sharing ideas and positions, and to inspire thinking about ways to bring greater justice, stronger rights, and a fairer future. *From Research to Impact* included:

Emergence, a series of five webinars hosted by 2019 Mentor Robert Steiner. This series of online interviews featured live conversations which were open to the public. *Emergence* webinars were held in both French and in English, with simultaneous audio translation, and ASL and LSQ sign interpretation. These sessions featured thought leaders from the Foundation community discussing core themes in the social sciences and humanities and changes emerging as a result of the COVID-19 pandemic.

Emergence:

June 4, 2020

Environment - 102 attendees

French

Panelists: Stéphanie Roy (2017 Scholar) and Pierre Cloutier de Repentigny (2017 Scholar)

Closing Remarks: Laure Waridel (2011 Scholar)

English

Panelists: Catriona Sandilands (2016 Fellow) and Neil Yeates (2018 Mentor)

Closing Remarks: Phoebe Stephens (2018 Scholar)

June 18, 2020

Human Rights - 111 attendees

French

Panelists: Margarida Garcia (2004 Scholar) and Christian Nadeau (2019 Fellow)

Closing Remarks: Carlo Charles (2019 Scholar).

English

Panelists: The Right Honourable Beverley McLachlin (2020 Mentor) and Mary Anne Chambers (2018 Mentor)

Closing Remarks: Robert Leckey (2003 Scholar)

July 2, 2020

First Nations, Inuit and Métis - 76 attendees

French

Panelists: Sophie Thériault (2003 Scholar) and Romeo Saganash (2005 Mentor)

Closing Remarks: Sébastien Brodeur-Girard (2016 Scholar)

English
Special Host: D. Memee Lavell-Harvard (2003 Scholar)
Panelists: Elizabeth Dowdeswell (2004 Mentor) and Patti LaBoucane-Benson (2004 Scholar)
Closing Remarks: Jamie Snook (2017 Scholar).

July 16, 2020

The Arts - 87 attendees
French
Panelists: Nathalie Bondil (2018 Mentor) and Patrice Sauvé (2020 Mentor)
Closing Remarks: Patricia Bérubé (2019 Scholar)
English
Panelists: Sara Angel (2012 Scholar) and Steven Loft (2010 Fellow) *Closing Remarks:* Diane Roberts (2019 Scholar)

July 23, 2020

Gender and Social Equity - 60 attendees
French
Panelists: Nathalie Des Rosiers (2020 Mentor) and Renée Dupuis (2009 Mentor)
Closing Remarks: Magaly Brodeur (2009 Scholar)
English
Panelists: Cecilia Benoit (2018 Fellow) and Sophie Pierre (2017 Mentor)
Closing Remarks: Daniel Del Gobbo (2017 Scholar)

Spaces of Engaged Leadership, a series of five webinars developed exclusively for the Foundation community and led by 2019 Fellows and Mentors. *Spaces of Engaged Leadership* addressed similar themes to those in the *Emergence* series, focusing specifically on leadership training for Scholars.

Spaces of Engaged Leadership:

June 11, 2020

Environment
Host: Nadia Joe (2019 Mentor)
Panelist: Jessica Asch

June 25, 2020

Human Rights
Host: Christine Hanson (2019 Mentor)
Panelists: Phillipe-André Tessier, Marie-Claude Landry and Kasari Govender
Closing Remarks: Laya Behbahani (2020 Scholar)

July 9, 2020

Arts and Indigenous Leaders
Hosts: Nadia Joe (2019 Mentor) and Shannon Litzenberger (2019 Mentor)
Closing Remarks: Leah Carrier (2020 Scholar)

July 30, 2020

Gender and Social Equity
Hosts: Lia Grimanis (2019 Mentor) and Rita Karakas (2019 Mentor)
Panelists: Paulette Senior, Cynthia Wesley-Esquimaux and Alison Holder
Closing Remarks: Rémy Paulin Twahirwa (2020 Scholar)

“Racial Justice, Righteous Outrage and Open Discourse”, a special webinar on August 13, 2020, featuring a conversation with Richard T. Ford, who is the George E. Osborne Professor of Law at Stanford University. Sarah Mason-Case (2017 Scholar) moderated and Milad Parpouchi (2017 Scholar) provided commentary.

In order to engage the public on the implications of the pandemic through perspectives inspired by the Foundation’s Four Themes, the **COVID-19 Impact Committee** was created. Our themes have proven to be more relevant than ever in the context of issues raised by the pandemic in Canada and abroad. Read more about this committee in “Engagement of the Community”.

Thank you to our Washington, D.C. partners for their contributions to what would have been an exciting Institute

- Embassy of Canada to the United States
- Center for the Advancement of the Rule of Law in the Americas (CAROLA) at Georgetown University
- Common Good City Farm
- Global Press
- The Quebec Government Office in Washington
- Gallaudet University
- United States Holocaust Memorial Museum (USHMM)
- The National Museum of the American Indian (NMAI)
- The National Museum of African American History and Culture (NMAAHC)
- Reporters Committee for Freedom of the Press
- The Canadian delegation at the World Bank
- The Organization of American States

Thank you to our partners in Yellowknife, who contributed to the success of our first Institute

- Canadian Coast Guard
- Dechinta: Centre for Research and Learning
- Hotù ts’eeda Research Support Centre
- Food Rescue Yellowknife



09.



Community Spotlights



“It is important for a leader to engage with those who hold viewpoints opposed to their own, as it is the process of discussion, argument, and critique that may lead to improvement of ideas and a better understanding of social problems and solutions for progress. Refraining from such engagement risks impeding change while fostering an echo chamber of agreement and ideological orthodoxy, thus, ultimately, maintaining the status quo.”

MILAD PARPOUCHI

2017 SCHOLAR

Milad Parpouchi is a public health professional, a research associate at the Somers Research Group in the Faculty of Health Sciences at Simon Fraser University and a Canadian Institutes of Health Research doctoral scholar. His research examines the marginalization of homeless adults living with mental illness, and the establishment of housing policies that promote greater social inclusion and equity.



“The greatest benefit of being a Pierre Elliott Trudeau Foundation Scholar has undoubtedly been its community. Joining this community has allowed me to form invaluable collaborative relationships. As a community member I have also had the opportunity to learn from Scholars working on issues related to my research from a variety of disciplinary backgrounds and perspectives. My work would not be the same without it.”

ALEXANDRA MOGYOROS

2018 SCHOLAR

Alexandra Mogyoros is a lawyer and scholar whose research explores how private law can empower individuals to be responsible global citizens, focusing on issues that arise at the intersection of intellectual property law, technology and social justice. She is currently a doctoral student at the University of Oxford and is acting assistant professor within the Faculty of Law at Ryerson University, where she teaches property law and legal theory.



COMMUNITY SPOTLIGHTS

“The Foundation has helped me establish relationships with Mentors who support me in my endeavors. This is an additional benefit that enables me to develop my leadership skills, thereby helping me to improve the living conditions of homeless people. The Foundation opens up access to a wealth of knowledge through various events that inspire me to think critically about social issues.”

CAROLINE LEBLANC

2019 SCHOLAR
MEMBER OF THE ADVISORY
COMMITTEE ON DIVERSITY

Caroline Leblanc’s doctoral research examines individual and structural barriers that impede access to shelters and other services for homeless adults. Her work is driven by the desire to develop interventions that help homeless populations secure resources and reduce their health risks. Her own experience of homelessness inspired her to take an academic path focused on human dignity and social justice. She is currently a doctoral student and course instructor at Université de Sherbrooke



COMMUNITY SPOTLIGHTS

“The Pierre Elliott Trudeau Foundation gives me the chance to rub shoulders with other Scholars, Mentors and Fellows from different fields and backgrounds. I find it very enriching to gain knowledge from outside of my own scholarly community.”

DARREN “DAZ” SAUNDERS

2019 SCHOLAR
MEMBER OF THE ADVISORY
COMMITTEE ON DIVERSITY

Darren “Daz” Saunders’ research focuses on language recognition, signing, and the contribution of deaf intellectuals. Daz learned about the importance of civic engagement from his deaf parents, who believed participation to be a fundamental aspect of advancing social change. As an engaged citizen, Daz contributes to community organizations by advocating for full deaf access to health, the arts, justice and information. He is currently a doctoral student and research assistant with the Groupe de recherche sur la LSQ et le bilinguisme sourd at Université du Québec à Montreal.



“Being part of the Alumni Network Executive is having a remarkable impact on my personal and professional life for two main reasons: It is allowing me to be part of a group of engaged academics and practitioners with tremendous experience across fields and disciplines; and, it is enabling the possibility of imagining future initiatives to reconnect Scholars, Mentors, and Fellows who are scattered around the world.”

LIBE GARCÍA ZARRANZ, PH.D.

2010 SCHOLAR
MEMBER OF THE ALUMNI EXECUTIVE
AND CO-EDITOR OF THE ALUMNI
NEWSLETTER

Libe García Zarranz is Associate Professor in Literature in English in the Department of Teacher Education at the Norwegian University of Science and Technology (NTNU) in Norway. She is also Research Affiliate for the Canadian Literature Centre at the University of Alberta. Her research looks at the intersection of contemporary Canadian literature, feminist and queer philosophy, trans literature and visual art, affect theory, and transnational studies.



“Being a Fellow has provided me with the wonderful opportunity of meeting a dynamic community of Scholars from different research backgrounds. I have also had the good fortune of working alongside researchers, Mentors and students from my 2019 cohort. This has directly influenced my research.”

CHRISTIAN NADEAU, PH.D.

2019 FELLOW

Christian Nadeau has been teaching the history of political ideas as well as contemporary moral and political philosophy in the Department of Philosophy at Université de Montréal since 2002. He has been a visiting professor at several universities in France and is the author of a dozen books and numerous scientific articles. His research addresses the moral philosophy of responsibility and the political philosophy of theories of democracy.



COMMUNITY SPOTLIGHTS



“We have to invent a new kind of being together that is not grounded in looking for similarities between us and other people, but rather grounded in recognition that our society is a cosmopolitan society made up of people from many different races, backgrounds, perspectives, genders, and multiple intersecting identities. We have to work on building this new ideal of a modern society that is grounded in ideas of belonging for everybody, respect, listening, rejection of exclusionary discriminatory ideas and thinking.”

THE RIGHT HONOURABLE

BEVERLEY MCLACHLIN

2020 MENTOR

MEMBER OF THE COVID-19 IMPACT COMMITTEE

The Right Honourable Beverley McLachlin is a former Justice of the Supreme Court of Canada and served as Chief Justice from 2000 to 2017. Rt. Hon. McLachlin is the author of numerous legal articles and publications and has given lectures in Canada and around the world on legal and constitutional matters. She currently works as an arbitrator and mediator in Canada and internationally and sits as a justice of the Hong Kong Final Court of Appeal, the Singapore International Commercial Court and is a panel member of the Hong Kong International Arbitration Centre. She serves on several charitable boards and pursues her commitment for improved access to legal services as President of the National Action Committee on Access to Justice.



COMMUNITY SPOTLIGHTS



10.

Scholarships

This year, the Foundation selected 16 outstanding Ph.D. students from across Canada and the world.

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

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



ANNUAL REPORT 2019 - 2020

1. Laya Behbahani Communication, Simon Fraser University focuses on the narrativization of the triad of forced labour, modern day slavery, and human trafficking experiences in the Gulf States of the Middle East.

2. Joel Bernbaum Interdisciplinary Studies, University of Saskatchewan investigates the potential of theatre to strengthen cities.

3. Jérémy Boulanger-Bonnely Law, University of Toronto explores the role of public participation in improving access to justice.

4. Carole Boulebsol Applied Human Sciences, Université de Montréal studies the experiences of women who have been subjected to reproductive coercion in a context of migration.

5. Leah Carrier Nursing, Dalhousie University examines the impact of cultural connectedness on mental health outcomes and how cultural interventions can be implemented with Indigenous children and youth.

6. Jasmine Dionne Political Science, University of Victoria is committed to the development of solutions to the Missing and Murdered Indigenous Women, Girls, and LGBTQ2S+ crisis.

7. Allison Furniss Sociology, University of Cape Town studies women's resistance amongst gendered labour in the artisanal mines of the eastern Democratic Republic of Congo.

8. Christina Goldhar Geography, Memorial University investigates the relationship between housing insecurity and homelessness in the Canadian North, public policy, and governance.

9. Jennifer Lavalley Interdisciplinary Studies, University of British Columbia studies the experiences of Indigenous people who use drugs in order to optimize and ensure the cultural relevance of overdose-focused harm reduction and substance use treatment.

10. Anita Lazurko Social and Ecological Sustainability, University of Waterloo explores transformation pathways in river basins governance systems attempting to build adaptivity and/or resilience to uncertain climatic and socio-economic futures.

11. Kalpana Iyer Mohanty History, Harvard University focuses on the history of disability in South Asia during high colonialism, building on her own experiences as a woman of South Asian origin with a disability.

12. Veronica Øverlid Law, Carleton University examines the Migrant Caravan in Central America as a social resistance movement, considering its implications for international law.

13. Kelsey Pennanen Archaeology, University of Calgary works on the visualization and digital archiving of threatened Indigenous cultural and heritage sites in southern Yukon.

14. Christophe Tremblay Social Work, Université Laval specializes in gerontological mental health and conducts research on the recovery of aging people with a severe mental disorder.

15. Rémy Paulin Twahirwa Sociology, London School of Economics studies the occurrence and management of violence in migrant detention centres in Canada and the United Kingdom.

16. Charlie Wall-Andrews Policy and Management, Ryerson University examines barriers to equity within the cultural and creative sector and how to ensure equity within extremely inequitable industries.



Laya Behbahani



Joel Bernbaum



Jérémy Boulanger-Bonnely



Carole Boulebsol



Leah Carrier



Jasmine Dionne



Allison Furniss



Christina Goldhar



Jennifer Lavalley



Anita Lazurko



Kalpana Iyer Mohanty



Veronica Øverlid



Kelsey Pennanen



Christophe Tremblay



Rémy Paulin Twahirwa



Charlie Wall-Andrews

ANNUAL REPORT 2019 - 2020

2020
SCHOLARS YEARBOOK

Fellowships

The Foundation appointed four Fellows in 2020, who are leading researchers and public educators. Over a three-year cycle, Fellows help lead the *Institutes of Engaged Leadership* and provide guidance and support to our Scholars.

Fulbright Canada–Pierre Elliott Trudeau Foundation Fellow / Joint Chair in Contemporary Public Policy

This year, Fulbright Canada and the Pierre Elliott Trudeau Foundation came together to create a dedicated Chair in Contemporary Public Policy which aims to attract one leading U.S.-based American scholar each year to participate in a residential exchange in Canada, where they are cohosted by the Foundation and a partner institution (McGill University in 2020). This Fellow contributes to the Foundation’s mission by acting as a guide and mentor to our Scholars and playing an active role in our *Institutes of Engaged Leadership* and other programming.



1. Glenn Cohen, Ph.D. is a Professor of Law and Faculty Director at the Petrie Flom-Center at Harvard Law School. He is one of the world’s leading experts on the intersection of bioethics and the law, as well as health law. His current projects relate to big data, health information technologies, mobile health, reproduction/reproductive technology, research ethics, organ transplantation, rationing in law and medicine, health policy, FDA law, translational medicine, and medical tourism.

2. Randall Harp, Ph.D. Fulbright Canada–Pierre Elliott Trudeau Foundation Fellowship / Joint Chair in Contemporary Public Policy is an Associate Professor in the Department of Philosophy at the University of Vermont, whose main research areas are in the philosophy of action (particularly collective action and decision theory) and in the philosophy of social sciences. He is interested in what it means to be an agent, and in how our agency changes in collective and social contexts.

3. Ubaka Ogbogu, Ph.D. is an Professor in the Faculties of Law and Pharmacy & Pharmaceutical Sciences, and the Katz Research Fellow in Health Law and Science Policy, at the University of Alberta. His work is focused broadly on the ethical, legal, and societal implications of novel and emerging biotechnologies and associated research.

4. Vardit Ravitsky, Ph.D. is a Professor at the Bioethics Program, School of Public Health, Université de Montréal. She is President of the International Association of Bioethics and Director of Ethics and Health at the Center for Research on Ethics. Her research focuses on the ethics of genomics and reproduction and is funded by Canada’s leading funding agencies.



Glenn Cohen, Ph.D.



Randall Harp, Ph.D.



Ubaka Ogbogu, Ph.D.



Vardit Ravitsky, Ph.D.

Mentorships

The Foundation appointed seven Mentors in 2020. These accomplished leaders from various sectors – private, public, parapublic, and non-profit – and professional domains, reflect the range of skills we believe are of great value to future Engaged Leaders. Mentors teach leadership skills to our Scholars and help them connect to networks beyond academia.

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 Mentors’ guidance, 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.



- 1. Nathalie Des Rosiers, Ph.D.** is the principal of Massey College and a former member of the Legislative Assembly of Ontario, representing the riding of Ottawa-Vanier from November 2016 until July 2019. Prior to entering politics, she was Dean of the Faculty of law, Common Law section, at the University of Ottawa.
- 2. Bob Haverluck** is a Manitoba artist-educator and theologian who works with community groups using the arts to help engage environmental issues.
- 3. Janice McDonald** is a sought-after speaker, advisor, and leadership expert. An award-winning serial entrepreneur, she has expertise in the music industry, apparel/accessories and start-ups.
- 4. Rt. Hon. Beverley McLachlin** is a former justice of the Supreme Court of Canada and served as Chief Justice from January, 2000 until her retirement in December, 2017.
- 5. Eric M. Meslin, Ph.D.** has had a three-decade long career in academic, government and not-for profit settings focusing on the ethical, social and political implications of health, science, and technology.
- 6. Patrice Sauvé** is a film director and audacious visual master. His work was awarded numerous Prix Gémeaux and other prizes for directing.
- 7. Denise Williams** is the CEO of First Nations Technology Council and works with Indigenous peoples, governments, academics, technology futurists and social changemakers to map the ecosystem that will result in fair and equitable access to the tools and education required for success in the digital age.

1

Nathalie Des Rosiers, Ph.D.

2

Bob Haverluck

3

Janice McDonald

4

Rt. Hon. Beverley McLachlin

5

Eric M. Meslin, Ph.D.

6

Patrice Sauvé

7

Denise Williams



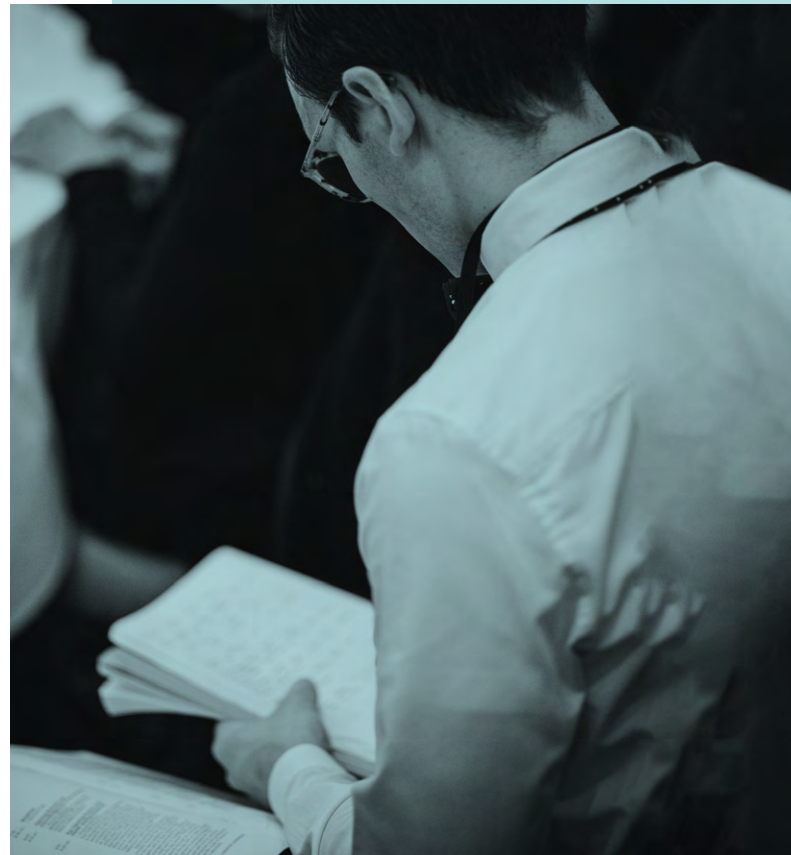
13.

BilingualismPlus

The Pierre Elliott Trudeau Foundation supports the increased proficiency of its Scholars in Canada's Official Languages – English and French – and in Canada's Indigenous Languages. Our *Policy on Language: **BilingualismPlus*** provides a framework for all Scholars to improve in English and French. Scholars are also encouraged to become familiar with Indigenous Languages, aligning with the goals of the Foundation's *Strategic Plan 2019–2024*, and recognizing that diversity can take various forms, including through Indigenous knowledge.

This Policy recognizes the significance of Canada's Indigenous Languages as an integral part of its historic and future development. Through the implementation of this Policy, the Foundation is contributing to efforts aimed at the preservation and revitalization of Indigenous Languages, which are being led by a variety of organizations and individuals in Canada.

Scholars become familiar with one or more Indigenous Language through Foundation-led activities and may even elect to pursue more intensive training. Scholars who are not fluently bilingual in both Official Languages are expected to take steps through formal or informal training to improve their proficiency.



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Looking Ahead



Since our Funding Agreement was established in 2002, Canada and the world have changed, and so the role of the Foundation – even within its existing mandate – has also evolved significantly.

With the approval of the *Strategic Plan 2019-2024* adopted by the Board of Directors in December 2019, the Foundation's goal, now more than ever before, is to equip today's Scholars with the tools they need to be effective, inspiring, and innovative leaders in the 21st century. In Canada today, that means an added focus on the country's diversity, its regional differences, and its shared values. The Foundation is undertaking meaningful change in this regard, which builds upon our formidable history and legacy.

The fiscal year ending August 31, 2021 will be an important transition year for the Foundation. In addition to continuing the work to implement our *Strategic Plan 2019-2024*, the Foundation will be navigating through the economic aftermath of the COVID-19 global pandemic.

Our Programs

The Foundation will continue to deliver Scholarship, Fellowship, and Mentorship programs, as well as public interaction events. In the uncertain context of the ongoing pandemic, we anticipate at least some events and activities organized by the Foundation will continue to take place using virtual platforms instead of in-person gatherings in 2021.



Scholarship Program

The Foundation plans on selecting at least 14 new Scholars in the spring of 2021.

The Foundation will continue to encourage Scholars to engage in its leadership program, to continue growing as leaders in their communities and institutions, and to embody the values of *Inclusive Excellence and Engaged Leadership*.

Fellowship Program

The Foundation intends to appoint at least four new Fellows in 2021, including one joint Fulbright-Pierre Elliott Trudeau Foundation Fellow.

The Foundation will look for outstanding intellectual leaders on the scientific theme for the 2021 - 2024 Scientific Cycle, *Language, Culture & Identity*, who are public intellectuals and leading researchers with a demonstrated ability to create impact from their ideas.

Mentorship Program

The Foundation will name at least seven Mentors in 2021.

Mentors will be chosen based on their accomplishments, their mastery and deep-rooted knowledge of their field, and their ability to translate that knowledge into the leadership development of Scholars.

“Engaged leadership is the willingness to take calculated risks and remain viscerally aware of the stakes involved while staying committed to the common good. Heralding positive change while infusing an appreciation for human dignity and a sense of responsibility in each person—this is what makes a leader truly engaged.”

LAYA BEHBAHANI

2020 SCHOLAR

Laya Behbahani focuses on the narrativization of the triad of forced labour, modern day slavery and human trafficking experiences in the Gulf States of the Middle East. Her research has explored the role of the sponsorship system in shaping the experiences of the migrant work force in the Middle East, and the policies and politics that govern immigration, criminal laws and labour laws. In addition, she has collaborated on projects entailing the application areas of corporate responsibility and business models of forced labour in the United Kingdom. She is a Ph.D. student at the School of Communication at Simon Fraser University.



Public Interaction and Leadership Programs

As a result of the COVID-19 pandemic, including continuing travel restrictions and concerns surrounding group gatherings, the Foundation has modified its planned calendar of events for 2020-2021 as described in its *Strategic Plan 2019-2024*. Specifically, the Foundation will continue its virtual programming, *Spaces of Engaged Leadership*, a virtual learning platform developed in the first months of the pandemic in which Fellows and Mentors continue to coach and provide leadership training to Scholars. For the upcoming year, programming will be on the scientific themes of *Power & Knowledge* and *Technology & Ethics*. Our *Spaces of Engaged Leadership* virtual sessions, developed by Fellows and Mentors, will continue to immerse Scholars in unique leadership training and coaching, and provide guidance and advice that Scholars will not have access to elsewhere.

Contingent on changing restrictions due to the pandemic, the Foundation maintains its plans to hold our annual community retreat in the spring of 2021. As circumstances imposed by the pandemic evolve, it may be necessary to stage this event virtually.

Scientific Cycle for 2021-2024: Language, Culture & Identity

The scientific theme for 2021-2024, *Language, Culture & Identity*, will frame the leadership journey of our next cohort of Scholars to be selected in the spring of 2021. Through the guidance of Fellows and Mentors, 2021 Scholars will explore issues and debates around language(s) across disciplines, particularly issues at the intersection of language, culture,

and identity. Notably, the Foundation will focus on the challenges which remain in Canada around the implementation of institutional bilingualism, the protection of francophone minorities, the revitalization and preservation of Indigenous languages, as well as the implications of increasing linguistic diversity stemming from global migration. The 2021-2024 Scientific Cycle will also be an occasion to examine linguistic issues and debates in South Africa, a nation notable for its linguistic diversity and where a multilingual state policy has been in place for the last 25 years. By providing an international perspective and a point of comparison, the South African case will help broaden our Scholars' reflection on the intersection of language, culture, and identity, and prompt reflections on what Canada and South Africa could learn from each other's experience with languages.

Fundraising and Development

As part of its strategic plan, the Foundation continues to develop a renewed fundraising and development roadmap. During the *Future Forums* listening and learning tour in 2018-2019, the Foundation had remarkable support from several key sponsors and partners, which offered generous financial assistance, significant visibility, and positive feedback. Support from the public and members of the community for the Foundation's mission has further inspired us to explore opportunities for fundraising, development, and sponsorships. In the coming years, the Foundation will build a campaign to help enhance the knowledge and experience offered to Scholars through its *Institutes of Engaged Leadership*.

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 provide fundamental guidance to the Foundation as it carries out its mission, representing an instrument of knowledge sharing within our community and the broader public.

Directors are elected by the Members of the Foundation at the Annual Member’s Meeting, normally held each autumn.

The Foundation is governed by a diverse and distinguished Board of up to 18 directors. Two seats are reserved for directors appointed by the Minister of Innovation, Science and Economic Development Canada (“ISED”) and another two for representatives of the family of the late Pierre Elliott Trudeau.



Members

Serving between September 1, 2019 and August 31, 2020

Regular Members

- Thomas Axworthy
- William Davis
- John English
- Ron Graham
- Sacha Haque
- Louise Houle
- Edward Johnson
- David Johnston
- Frederick H. Lowy
- Joseph MacInnis
(retired April 15, 2020)
- Bruce McNiven
- Farah Mohamed
- Robert Murdoch
- Hilary Pearson
(term started November 8, 2019)
- Patrick Pichette
- Sean Riley
- Roy Romanow
- Peter Sahlas
- Nancy Southam
- Janice Stein
(term ended March 17, 2020)
- Stephen Toope

Government-appointed Members

- Dennis Browne

Succession Members

- Alexandre Trudeau
- Justin Trudeau *

* NOTE: The Rt. Hon. Justin Trudeau has withdrawn from the affairs of the Foundation for the duration of his involvement in federal politics.

Board of Directors

Serving between September 1, 2019 and August 31, 2020

Directors elected by the Regular Members

- Dyane Adam
(term started May 15, 2020)
- Kim Brooks
- Suzanne Fortier
- Lisa Helps
(term started March 15, 2020)
- Jameel Jaffer
- Edward Johnson
- Megan Leslie
- Bruce McNiven
- Mélanie Millette
(term ended November 8, 2019)
- Farah Mohamed
- Bessma Momani
- Patrick Pichette (Chair)
- Madeleine Redfern
- Duncan Reid
- Jennifer Welsh

Director elected by the Government-appointed Members

- Marc Renaud

Directors elected by the liquidators of the succession of the late Rt. Hon. Pierre Elliott Trudeau

- Peter Sahlas
- Alexandre Trudeau



Application and Nomination Review Committee (the “ANRC”)

- Thomas Axworthy
- Karen Barnes
- John Coleman
- John English
- Jean-François Gaudreault-DesBiens
- Robert Huish
- Sébastien Jodoin
- Anna Korteweg
- Bessma Momani
- Mona Nemer (Chair)
- Dwight Newman
- Shana Poplack
- Sophie Thériault
- Rosalie Tung
- Sanni Yaya

Foundation Team

Permanent employees on August 31, 2020, in alphabetical order:

- Aurélie Allain
- Kathleen Angers
- Tim Duboyce
- Pascale Fournier
- Thomas Ledwell
- Caroline Lin
- Ashley Montgomery
- Elizabeth Rivera
- Phaedra de Saint-Rome
- Jade Sionnière
- Rukiye Temel

16.

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 Université de Montréal
 Massey College | University of Toronto

Our Donors and Sponsors

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 Megan Leslie
 Lois Maeder-Alves
 Vince Mirabelli
 Graham Reynolds
 McCall MacBain Foundation

McCall MacBain Foundation Matching

Through a funding agreement with the McCall MacBain Foundation, philanthropic donations provided to the Foundation are generously matched dollar-for-dollar. These donations and the matching fund allow the Foundation to deliver on its mission to the fullest extent.



Michael K. Hawes, Ph.D.

PRESIDENT AND CEO,
 FULBRIGHT CANADA

Partnership with Fulbright Canada

“The Fulbright Canada – Pierre Elliott Trudeau Foundation Joint Chair in Contemporary Public Policy Fellowship Program is a partnership that reflects the vision and the principles of both organizations. We share a 21st century commitment to empowering extraordinary scholars to drive meaningful change in their institutions, their communities, and the world.”

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Change

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Financial Statements



Independent Auditor's Report

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 Elliot Trudeau/The Pierre Elliott Trudeau Foundation (the Foundation) as at August 31, 2020 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, 2020;
- 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 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.

(s) PricewaterhouseCoopers LLP¹

**Montréal, Quebec
November 20, 2020**

*PricewaterhouseCoopers LLP/s.r.l./s.e.n.c.r.l.
1250 René-Lévesque Boulevard West,
Suite 2500
Montréal, Quebec, Canada H3B 4Y1
T. +1 514-205-5000, F. +1 514-876-1502*

¹ CPA auditor, CA, public accountancy permit No. A111799



Statement of Financial Position

AS AT AUGUST 31, 2020

	2020	2019
	\$	\$
Assets		
Current assets		
Cash and cash equivalents	1,227,324	781,535
Prepaid expenses and other receivables	256,878	374,976
	1,484,202	1,156,511
Investments at fair value (note 4)	150,823,855	143,778,124
Property and equipment (note 5)	400,775	473,147
Intangible assets (note 6)	145,614	75,574
	152,854,446	145,483,356
Liabilities		
Current liabilities		
Accounts payable and accrued liabilities	1,627,074	1,394,635
Current portion of Scholarships payable (note 8(a))	1,532,245	1,643,490
Current portion of Fellowships payable (note 8(b))	352,908	690,267
Current portion of Mentorships payable (note 8(c))	270,176	135,762
	3,782,403	3,864,154
Deferred donations (note 7)	238,079	238,079
Scholarships payable (note 8(a))	1,362,532	1,641,533
Fellowships payable (note 8(b))	301,845	460,193
Mentorships payable (note 8(c))	417,007	34,033
	2,319,463	2,373,838
	6,101,866	6,237,992
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)	546,389	549,547
Internally restricted net assets (notes 3 and 10)	19,201,570	11,564,190
Unrestricted net assets (notes 3 and 11)	2,004,621	2,131,627
	146,752,580	139,245,364
	152,854,446	145,483,356



Statement of Changes in Net Assets

FOR THE YEAR ENDED AUGUST 31, 2020

	2020	2019
	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	549,547
		11,564,190
		2,131,627
		139,245,364
		139,611,212
Excess of revenues over expenses (expenses over revenues) for the year	-	(130,164)
		7,637,380
		-
		7,507,216
		(365,848)
Investment in property and equipment and intangible assets	-	127,006
		-
		(127,006)
		-
		-
Balance – End of year	125,000,000	546,389
		19,201,570
		2,004,621
		146,752,580
		139,245,364



Statement of Revenues and Expenses

FOR THE YEAR ENDED AUGUST 31, 2020

	2020	2019
	\$	\$
Revenues		
Investment revenue	2,514,833	2,618,185
Net gain on disposal of investments at fair value	1,293,192	438,178
Net unrealized gain on investments at fair value	9,265,778	2,880,620
Donations (note 15)	72,098	143,535
	13,145,901	6,080,518
Expenses		
Public Interaction program (note 14(b))	1,066,607	1,067,058
Scholarship program	1,384,365	2,012,257
Fellowship and mentorship program	767,585	918,996
Program planning and delivery (note 16)	1,616,059	1,573,079
Administration (note 16)	164,737	206,039
Investment management (note 16)	320,987	303,229
Outreach, development and other (note 16)	318,345	365,708
	5,638,685	6,446,366
Excess of revenues over expenses (expenses over revenues) for the year	7,507,216	(365,848)



Statement of Cash Flows

FOR THE YEAR ENDED AUGUST 31, 2020

	2020	2019
	\$	\$
Cash flows from		
Operating activities		
Excess of revenues over expenses (expenses over revenues) for the year	7,507,216	(365,848)
Items not affecting cash and cash equivalents		
Net gain on disposal of investments at fair value	(1,293,192)	(438,178)
Net unrealized gain on investments at fair value	(9,265,778)	(2,880,620)
Donations received in-kind (note 5)	(25,600)	-
Accretion expense on Scholarships, Fellowships and Mentorships payable (note 8)	35,564	103,156
Amortization of property and equipment	106,076	108,524
Amortization of intangible assets	24,088	1,166
	(2,911,626)	(3,471,800)
Changes in non-cash working capital components		
Decrease (increase) in		
Prepaid expenses and other receivables	118,098	(99,973)
Increase (decrease) in		
Accounts payable and accrued liabilities	232,439	(233,098)
Scholarships, Fellowships and Mentorships payable	(404,129)	(78,868)
	(53,592)	(411,939)
	(2,965,218)	(3,883,739)
Investing activities		
Purchase of investments at fair value	(12,462,598)	(26,582,405)
Proceeds on disposal of investments at fair value	15,975,011	30,597,127
Purchase of property, equipment and intangible assets	(101,406)	(116,313)
	3,411,007	3,898,409
Net change in cash and cash equivalents during the year	445,789	14,670
Cash and cash equivalents – Beginning of year	781,535	766,865
Cash and cash equivalents – End of year	1,227,324	781,535



Notes to Financial Statements

AUGUST 31, 2020

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

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.

On March 11, 2020, the World Health Organization announced that COVID-19 (2019 coronavirus disease) could be classified as a pandemic. The announcement triggered the implementation of a series of public health and emergency measures to combat the spread of the virus, including the closure of so-called non-essential businesses. The activities of Scholarship, Fellowship and Mentorship programs have been impacted in particular because of the confinement.

As at August 31, 2020, management reviewed the Foundation’s liquidity position and funding requirement. While the disruption is expected to be temporary, there is uncertainty as to its duration. At the time of finalizing these financial statements, it is not possible to reliably estimate the duration and seriousness of these developments and their impact on the financial results and the financial position of the Foundation.



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 “heldfortrading 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’ shortterm 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.

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. Accretion expense (income) may occur when differences between the fair value of liability and the actual payment exist.

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 longlived 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, 2020, 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 \$19,201,570 (2019 – \$11,564,190) (note 10), net assets invested in property and equipment and intangible assets of \$546,389 (2019 – \$549,547) (notes 5 and 6) and unrestricted net assets of \$2,004,621 (2019 – \$2,131,627) (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.

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.

	2020	2019
	\$	\$
Short-term investments pooled fund	3,667,328	3,381,525
Canadian bond pooled fund	49,254,559	48,277,390
Canadian equity pooled fund	10,233,865	10,496,659
Global equity pooled fund	75,896,551	70,216,890
Alternative assets fund	11,771,552	11,405,660
	150,823,855	143,778,124

5. Property and equipment

			2020	2019
	Cost \$	Accumulated amortization \$	Net \$	Net \$
Office communication equipment	53,428	40,110	13,318	13,333
Furniture and fixtures	161,370	120,508	40,862	43,658
Computer equipment	154,323	127,918	26,405	31,945
Leasehold improvements	884,518	608,111	276,407	366,028
Artwork	43,783	-	43,783	18,183
	1,297,422	896,647	400,775	473,147

During the year ended August 31, 2020, \$25,600 of property and equipment was gifted to the Foundation.



6. Intangible assets

			2020	2019
	Cost \$	Accumulated amortization \$	Net \$	Net \$
Computer software	62,051	58,553	3,498	4,664
Software development costs	165,038	22,922	142,116	70,910
	227,089	81,475	145,614	75,574

7. Deferred donations

Deferred donations consist of restricted donations that will be used to cover charges related to special initiatives. The donations do not have any maturity date.

8. Long-term liabilities

A) Scholarships payable

	2020	2019
	\$	\$
Current portion of Scholarships payable	1,532,245	1,643,490
Long-term portion of Scholarships payable in years ending		
August 31, 2021	-	1,219,441
August 31, 2022	980,135	422,092
August 31, 2023	382,397	-
	1,362,532	1,641,533
	2,894,777	3,285,023

B) Fellowships payable

	2020	2019
	\$	\$
Current portion of Fellowships payable	352,908	690,267
Long-term portion of Fellowships payable in years ending		
August 31, 2021	-	340,335
August 31, 2022	256,958	119,858
August 31, 2023	44,887	-
	301,845	460,193
	654,753	1,150,460



C) Mentorships payable

	2020	2019
	\$	\$
Current portion of Mentorships payable	270,176	135,762
Long-term portion of Mentorships payable in years ending		
August 31, 2021	-	34,033
August 31, 2022	277,356	-
August 31, 2023	139,651	-
	417,007	34,033
	687,183	169,795

Non-cash interest expenses included in program expenses bearing interest at a rate of 1.65% (2019 – 1.41%), calculated using the effective interest rate method, are as follows:

	2020	2019
	\$	\$
Scholarship program	26,104	75,911
Fellowship program	5,902	24,540
Mentorship program	2,558	2,705
	34,564	103,156

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 and its amendments, the endowment bears no interest and must be capitalized in perpetuity.

As at August 31, 2020, the Foundation satisfied the compliance requirements.



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.

For the year ended August 31, 2020, the Foundation had an excess of revenues over expenses of \$7,507,216 (2019 – excess of expenses over revenues of \$365,848) and, as a result, capitalized \$7,637,380 to internally restricted net assets (2019 – nil).

As at August 31, 2020, the internally restricted net assets amounted to \$19,201,570 (2019 – \$11,564,190).

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.

Unrestricted net assets comprise two sources of funds: the cumulative growth of the Endowment Fund and the Private Donation Fund.

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).

As at August 31, 2020, unrestricted net assets amounted to \$2,004,621 (2019 – \$2,131,627).

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, 2020, 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, 2021	2,219,088
Years ending August 31, 2022	934,300
Years ending August 31, 2023	470,000



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, 2021	222,000
Years ending August 31, 2022	214,000
Years ending August 31, 2023	213,000
Years ending August 31, 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 2020 the Foundation awarded 16 Scholarships, 4 Fellowships and 7 Mentorships (2019 – 20 Scholarships, 5 Fellowships and 7 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:



	2020	2019
	\$	\$
Research, travel and networking	651,670	779,256
Events and other activities	414,937	287,802
	1,066,607	1,067,058

15. Donations received and recognized as revenue during the year

	2020	2019
	\$	\$
Donations received	46,498	143,535
Donations received in-kind	25,600	-
Less: Donations deferred during the year (note 7)	-	-
	72,098	143,535
Plus: Amount recognized as revenue during the year (note 7)	-	-
Donation income for the year	72,098	143,535

Donations made by directors, members, officers and related parties totalled \$116 for the year ended August 31, 2020 (2019 – \$116).



16. Schedule of operating expenses

Operating expenses are costs incurred to support the Scholarship, Fellowship and Mentorship programs.

	Program planning and delivery		Administration		Outreach, development and other		Total	
	2020 \$	2019 \$	2020 \$	2019 \$	2020 \$	2019 \$	2020 \$	2019 \$
Salaries and benefits	1,079,654	1,063,394	128,563	129,428	77,414	77,328	1,285,631	1,270,150
Professional fees	127,006	192,283	68,719	130,648	38,119	22,977	233,844	345,908
Rent and occupancy costs	170,231	162,023	20,271	19,720	12,206	11,782	202,708	193,525
Office expenses	62,154	53,381	7,401	6,497	4,457	3,882	74,012	63,760
Amortization of property and equipment	82,199	84,750	9,788	10,315	5,894	6,163	97,881	101,228
Amortization of intangible assets	18,813	910	2,240	111	1,349	66	22,402	1,087
Meetings and travel	19,072	11,379	60,327	84,916	1,368	987	80,767	97,282
Outreach and communications	11,343	5,167	-	-	36,270	12,538	47,613	17,705
Recruitment costs	16,287	-	1,939	29,936	1,168	-	19,394	29,936
Other employee expenses	26,623	-	3,170	1,908	-	-	31,701	24,493
Administration expenses covered by Private Donation Fund	-	-	(138,000)	(230,000)	138,000	230,000	-	-
	1,616,059	1,573,079	164,737	206,039	318,345	365,708	2,099,141	2,144,826

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 \$320,987 (2019 – \$303,229) 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.

During the year ended August 31, 2020, an amount of \$138,000 (2019 – \$230,000) 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, 2019 and 2020, 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.

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