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The Pierre Elliott Trudeau Foundation

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General Information

Background

A Canadian institution with a national purpose, the Pierre Elliott Trudeau Foundation is an independent and non-partisan charity. It was established in 2001 as a living memorial to the former Prime Minister by his family, friends, and colleagues. In 2002, the Government of Canada endowed the Foundation with a donation of \$125 million with the unanimous support of the House of Commons. In addition, the Foundation benefits from private sector donations in support of specific initiatives.

The Foundation has been incorporated on February 7, 2001 under Part II of the Canada Corporations Act (Not-for-Profit Organizations) and began operations in March 2002.

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

The Foundation reports periodically to the Minister of Industry regarding the Advanced Humanities and Human Sciences Fund received in 2002, as per the funding agreement with the Government of Canada.

The Foundation has been subject to the Access to Information Act and to the Privacy Act since 1 April 2007. The Foundation submits its reports on these matters to Parliament through the Minister of Industry Canada.

Responsibilities

The Pierre Elliott Trudeau Foundation funds outstanding scholars who conduct research into crucial public issues and creates opportunities for dialogue and collaboration across organizations and disciplines around four key themes: human rights, citizenship, international relations, and the environment. Through its scholarship, mentorship, fellowship and public interaction programs, the Foundation supports critical thinkers who make a significant contribution to solving crucial public issues. Since being established, the Foundation has granted hundreds of major awards to top researchers and highly accomplished individuals, in Canada and abroad.

The Foundation is governed by a diverse and highly distinguished Board of up to 18 directors, including two directors appointed by the Minister of Industry and two representatives of the family of the late Right Honourable Pierre Trudeau. The directors oversee the \$156 million endowment and an annual operating budget of \$6 million, and they set policies and program directions for the Foundation.

All awards granted by the Foundation follow a peer-review process. The rigorous nomination and selection process is described in detail on the Foundation's website at www.trudeaufoundation.ca.

Institutional Functions, Programs and Activities

CORE PROGRAMS

The Foundation is dedicated to the delivery of four core programs: three funding programs targeted towards scholars, fellows, and mentors, and a Public Interaction Program, intended to achieve knowledge acquisition, transfer, and exchange among our program beneficiaries and the public. The Foundation's annual activity cycle revolves around these four main programs.

Trudeau Mentorships

Up to twelve mentors are appointed each year. The Mentorship Program is an innovative experiment that seeks to forge intellectual and personal bonds between renowned

Canadians with extensive experience in public life and talented doctoral students. Mentors are drawn from an array of professional backgrounds, including business, public service, law, arts, journalism, and advocacy. They enjoy a nationwide and international reputation based on achievements in their own particular field, and, most importantly, are able to introduce scholars to their networks.

Trudeau Scholarships

Up to fifteen scholarships are awarded each year to support doctoral candidates pursuing research of compelling present-day concern that touches on one or more of the Foundation's four themes. Trudeau scholars are highly gifted individuals who are actively engaged in their fields and who are poised to become national and international figures. They are encouraged to work with Trudeau mentors and fellows. Interaction with the Trudeau community, non-academic spheres, and the general public is an essential aspect of the Scholarship Program.

Trudeau Fellowships

Up to five fellows are chosen each year in recognition of outstanding achievement, innovative approaches to issues of public policy, and commitment to public engagement. The Foundation provides support for the fellows to make extraordinary contributions in their fields through leading-edge research and creative work. As the Fellowship Program grows, the fellows build a network of imaginative people working together from a variety of perspectives to address fundamental social and policy issues.

Public Interaction Program

The Public Interaction Program (PIP) is the centrepiece that brings the three grant-giving programs together. The PIP events and the travel and research allowance provide unique opportunities to learn and exchange research, ideas, and proposals that focus on specific questions and to share relevant knowledge with colleagues from different disciplines and varied life and cultural backgrounds. The structure of our programs provides an opportunity for top researchers and fellows, upcoming PhD scholars, and practical-minded mentors to bring their expertise together and make knowledge exchange and transfer a reality. The PIP comes to life through four series of annual Trudeau events. In addition, members of the Trudeau community are encouraged to organize PIP events on major issues of public policy that affect Canadians and global society. Finally, we collaborate with other institutions and organizations to advance discussions in wider fields.

PROGRAMS

Description: These files consist of the Foundation's major programs, which include Trudeau Fellowships (annual awards to outstanding individuals who have set themselves apart through their research achievements, creativity and social commitment); Trudeau Scholarships (annual awards to support doctoral candidates pursuing research of compelling present-day concern); the Mentorship program (pairing up the most eminent

Canadian practitioners in all sectors of public life public intellectuals with the bright young Ph.D. student recipients of a Trudeau Scholarship); the Public Interaction Program (brings together the Trudeau Fellows, Scholars, Mentors and the public to generate debates on public policy affecting Canadians and global society). The records contained in these files include unsolicited awards given to Canadian and foreign recipients selected through rigorous nomination and selection processes, media clippings, calendars of events, templates related to program activities, correspondence (members, fellows, scholars, mentors, internal and external audiences).

Document Types: Awards, working documents, research documents, media clippings, calendar of events, templates, and correspondence, fellowships, scholarships, mentorship, public interaction, recipients, nomination and selection process, program activities.

Record Number: TF-004

- **Doctoral Scholarships**

Description: This bank describes information about candidates who are undertaking research of compelling present-day concern that touches on one or more of the four themes of the Foundation (i.e., Human Rights and Dignity, Responsible Citizenship, Canada in the World, and People and their Natural Environment) and who have been nominated for a Pierre Elliott Trudeau Foundation Doctoral Scholarship Award. Personal information may include the individual's full name, contact information, year of birth, gender, language(s), signature, citizenship, biographical information, geographic area, academic or professional qualifications, educational information, references, opinions and views about the individual, university attending, discipline and field of interest, proof of citizenship information, passport or visa information, photograph(s), Social Insurance Number (SIN), and financial institution information.

Class of Individuals: Admissible Canadian or foreign doctoral candidates, individuals who have made a nomination and/or provided letters of references or support, assessors and committee members.

Purpose: The information described by this bank is used to determine the eligibility of candidates nominated for a Trudeau Doctoral Scholarship. It is also used to control and monitor disbursements to award recipients in accordance with the Scholarship Funding Agreement, to select assessors and committee members, to create transaction files for payments to award holders and, for administrative and financial control and reporting purposes. The SIN is collected under the authority of the Income Tax Act and is used by the Canada Revenue Agency for data matching purposes, including income verification and the issuance of T4A slips.

Consistent Uses: Information may be used and disclosed in the following ways: As part of peer review, applications are disclosed to review and selection committees (internal and external), to site visit interviewers recruited from the academic, private and public sectors, and to the Board members responsible for the examination and approval of the nominations. The Foundation may also use personal information included with an application to identify prospective committee members and reviewers for future use in the course of its programs-related selection activities. The Foundation routinely publishes and disseminates

certain details about successful applications. These include name of the applicant, age, gender, institution and department and field of research. Files and databases containing personal information may also serve for program planning, evaluation and review, in audits, for research, and for generating statistics for these activities. The information is also used to maintain mailing lists, which are used to disseminate the Foundation's application forms, guidelines, and public relations information. Information may be kept for future referral by the Foundation for its selection and review committees. The SIN and other information is disclosed to the Canada Revenue Agency (Information Returns (Infodec), Databank no. CRA PPU 150) and the Province of Quebec for income tax purposes.

Retention and Disposal Standards: Under development.

RDA Number: TBD

Related Record Number: TF-004

TBS Registration: 20090470

Bank Number: TF PPU 100

- **Fellowships**

Description: This bank describes the information about candidates who have been nominated for a Trudeau Fellowship award. Direct applications are not accepted. Rather, the Foundation establishes a list of candidates based on suggestions put forward by an extensive nomination network in Canada and abroad. Each year, an independent jury of eminent researchers and intellectuals selects five Fellows who have set themselves apart through their research achievements, creativity and social commitment. Nominations are confidential to ensure the fairness and equanimity of the selection process. Personal information may include name, contact information, Social Insurance Number (SIN), year of birth, gender, language(s), signature, citizenship, biographical details, geographic area, academic qualifications, university-related research, field of interest, publications or documents about the nominee's work, testimony or newspaper articles attesting to the candidate's ability to take an active part in major society debates. Letters in support of the nomination may include further information on the person who has prepared the nomination letter, such as name, title, contact information, and academic or professional credentials.

Class of Individuals: Mostly individuals connected to Canadian universities, but under certain conditions, candidates with no institutional affiliation or candidates who are working abroad, individuals who have made a nomination and/or provided letters of reference or support, assessors and committee members.

Purpose: Information in this bank also includes the selection of assessors and committee members, the control and monitoring of disbursements to award recipients, individual fellowship holders, and the mailing lists for the distribution of information by the Foundation. The information is used for administrative and financial control and reporting, for the creation of transaction files on payments to award holders and for the distribution and dissemination of the Foundation's guidelines and its public relations information. The SIN is collected under the authority of the Income Tax Act and is used by the Canada Revenue Agency for data matching purposes, including income verification and the issuance of T4A slips.

Consistent Uses: Information may be used and disclosed in the following ways. As part of peer review, nominations are disclosed to review and selection committees (internal and external) and to the Board members responsible for the examination and approval of the nominations. The Foundation may also use personal information included with a nomination to identify prospective committee members and reviewers for future use in the course of its programs-related selection activities. The Foundation routinely publishes and disseminates certain details about successful nominations. These include the nominee's name, age, gender, institution, department and field of research or work credentials. Files and databases containing personal information may also serve for program planning, evaluation and review, research, in audits, and for generating statistics for these activities. Maintains mailing lists for the distribution of information by the Foundation. Information may be kept for future referral by the Foundation for its selection and review committees. The SIN and other information is disclosed to the Canada Revenue Agency (Information Returns (Infodec), Databank no. CRA PPU 150) and the Province of Quebec for income tax purposes.

Retention and Disposal Standards: Under development.

RDA Number: TBD

Related Record Number: TF-004

TBS Registration: 20090473

Bank Number: TF PPU 200

- **Mentorships**

Description: This bank describes the information about candidates who have been nominated for a Trudeau Mentorship. It also describes information used in the selection of assessors and committee members. Each year, after a rigorous selection process, the Foundation appoints up to twelve Mentors who are then matched with Trudeau Scholarship recipients to help them learn to make the transition from the academic world to the practical world. Personal information may include name, contact information, date of birth, gender, language(s), biographical information, geographic area, fields of interest and experience, photograph(s), Social Insurance Number (SIN), financial institution information, and disbursement information. Letters in support of a nomination may include further information on the nominee including references, opinions, academic or professional credentials and affiliations.

Class of Individuals: Individuals from a broad array of professions and disciplines, including arts and culture, public service and journalism to administration and business, the volunteer sector and the liberal professions, individuals who have made a nomination and/or provided letters of references or support, assessors and committee members.

Purpose: The personal information is used in the selection and appointment of individuals nominated for a Trudeau Mentorship. It is also used to select assessors and committee members, to control and monitor disbursements to award recipients in accordance with Foundation's Mentorship program, and to create transaction files on payments to award holders. The SIN is collected under the authority of the Income Tax Act and is used by the Canada Revenue Agency for data matching purposes, including income verification and the issuance of T4A

slips.

Consistent Uses: Information may be used and disclosed in the following ways: As part of peer review, nominations are disclosed to review and selection committees (internal and external) and to the Board members responsible for the examination and approval of the nominations. The Foundation may also use personal information included with a nomination to identify prospective committee members and reviewers for future use in the course of its programs-related selection activities. The Foundation routinely publishes and disseminates certain details about successful nominations. These include name of the nominee, gender, background and fields of interest and experience. Files and databases containing personal information may also be used for administrative and financial control, reporting, program planning, evaluation and review, audit, research, and statistical purposes. The information is also used to maintain mailing lists for the distribution and dissemination of the Foundation's guidelines and its public relations information. Information may be kept for future referral by the Foundation for its selection and review committees. The SIN and other information is disclosed to the Canada Revenue Agency (Information Returns (Infodoc), Databank, no. CRA PPU 150) and the Province of Quebec for income tax purposes.

Retention and Disposal Standards: Under development.

RDA Number: TBD

Related Record Number: TF-004

TBS Registration: 20090471

Bank Number: TF PPU 300

- **Public Interaction Program**

Description: This bank describes the information about all Trudeau Foundation award winners—Fellows, Scholars and Mentors—and serves to generate debates on major issues of public policy affecting Canadians and global society. PIP comes to life notably through four major annual events: the Trudeau Annual Conference on Public Policy (in November), the Trudeau Lectures (since 2008-09), the Trudeau Mentors-Scholars Retreat (February) and the Trudeau Summer Institute (May). Records containing information described by this bank include outlines of service(s), agreements and signed contracts, working papers or other documents relevant to the event, correspondence, memoranda, event proposals, travel expenses, honoraria, description of expenses and anticipated costs, list of potential participants, and budget and other accounting reports. Personal information may include name, contact information, language, citizenship, biographical information, academic or professional qualifications, opinions and comments, management's recommendations and decision, and service provider information.

Class of Individuals: Past and current individuals who are members of the Trudeau Foundation Community, including staff, Canadian and foreign individuals from the academic and professional communities, representatives of government, community groups, associations, media, universities, sponsors, contractors, and students.

Purpose: The personal information is used to document, monitor and administer

each and every event held by or with the Trudeau Foundation within the scope and guidelines of its Public Interaction Program (PIP).

Consistent Uses: Information may be used to communicate with all individuals involved with the planning and the management of each PIP event. It is used to maintain mailing lists for the distribution of information by the Foundation. Information may also be used for referral purposes in the organization of future events to be held by or co-sponsored by the Foundation. Information may be used for audit, evaluation, research, and / or statistical purposes.

Retention and Disposal Standards: Under development.

RDA Number: TBD

Related Record Number: TF-004

TBS Registration: 20090472

Bank Number: TF PPU 400

FUND DEVELOPMENT

The Foundation's assets are comprised of two separate funds: the cumulative growth of the Advanced Humanities and Human Sciences Fund and the Private Donations Fund. The Foundation multiplies efforts to raise more donations to further support its mission.

FUNDRAISING INITIATIVES

Description: These files contain ongoing confidential working papers pertaining to fundraising scenarios and activities. These are internal files, which are used and discussed among the President of the Foundation and its Board of Directors. Records contained in these files may include strategies for fundraising, business plans and business cases pertaining to donor support, correspondence and memorandums in general, and listings of potential and active donors.

Document Types: Fundraising, fundraising strategies, business plans, business cases for donor support, memorandums, correspondence, letters, donor mailing lists, listing of potential donors.

Record Number: TF-002

- **Fund Development - Donations**

Description: This bank describes information pertaining to past, current and potential donors to the Pierre Elliott Trudeau Foundation. Personal information may include name, title, contact information, name of employer, language of choice, financial institution information, signature, business affiliation, and the nature and amount of donation.

Class of Individuals: Individuals or targeted organizations that have expressed a particular interest in the Pierre Elliott Trudeau Foundation's programs and activities. Individuals in whose name the donation has been made in their honour or memory.

Purpose: The purpose of this bank is to administer the information collected from individuals and organizations that have made a donation, the amount donated, and to update information on past, current and potential donors.

Consistent Uses: The information is used for solicitation purposes, issuance of

tax receipts and the gift recognition program. Information may be used for audit, evaluation, research, and / or statistical purposes.

Retention and Disposal Standards: Under development.

RDA Number: TBD

Related Record Number: TF-002

TBS Registration: 20090469

Bank Number: TF PPU 500

INTERNAL SERVICES

Internal Services are groups of related activities and resources that are administered to support the needs of programs and other corporate obligations of an organization. These groups are: Management and Oversight Services; Communications Services; Legal Services; Human Resources Management Services; Financial Management Services; Information Management Services; Information Technology Services; Real Property Services; Materiel Services; Acquisition Services; and Travel and Other Administrative Services. Internal Services include only those activities and resources that apply across an organization and not to those provided specifically to a program.

ACQUISITIONS

Acquisition Services involve activities undertaken to acquire a good or service to fulfil a properly completed request (including a complete and accurate definition of requirements and certification that funds are available) until entering into or amending a contract.

- Procurement and Contracting
 - Professional Services Contracts

COMMUNICATIONS SERVICES

Communications Services involve activities undertaken to ensure that communications are effectively managed, well coordinated and responsive to the diverse information needs of the public. The communications management function ensures that the public—internal or external—receives government information, and that the views and concerns of the public are taken into account in the planning, management and evaluation of policies, programs, services and initiatives.

- Communications
 - Internal Communications
 - Public Communications

FINANCIAL MANAGEMENT

Financial management services involve activities undertaken to ensure the prudent use of resources, including planning, budgeting, accounting, reporting, control and oversight, analysis, decision support and advice, and financial systems.

- Financial Management
 - Accounts Payable
 - Accounts Receivable
 - Acquisition Cards

HUMAN RESOURCES MANAGEMENT

Human Resources Management Services involve activities undertaken for determining strategic direction, allocating resources among services and processes, as well as activities relating to analyzing exposure to risk and determining appropriate countermeasures. They ensure that the service operations and programs comply with applicable laws, regulations, policies, and/or plans.

- Classification of Positions
 - Staffing
- Compensation and Benefits
 - Attendance and Leave
 - Pay and Benefits
- Hospitality
 - Hospitality
- Human Resources Planning
- Occupational Health and Safety
 - Occupational Health and Safety
- Performance Management Reviews
 - Performance Management Reviews
- Recruitment and Staffing
 - Applications for Employment
 - Employee Personnel Record
 - Staffing
- Training and Development
 - Training and Development

MANAGEMENT AND OVERSIGHT SERVICES

Management and Oversight Services involve activities undertaken for determining strategic direction, and allocating resources among services and processes, as well as those activities related to analyzing exposure to risk and determining appropriate countermeasures. They ensure that the service operations and programs of the federal government comply with applicable laws, regulations, policies, and/or plans.

- Executive Services
 - Executive Correspondence

TRAVEL AND OTHER ADMINISTRATIVE SERVICES

Travel and Other Administrative Services include Government of Canada (GC) travel services, as well as those other internal services that do not smoothly fit with any of the internal services categories.

- Access to Information and Privacy
 - Access to Information and Privacy
- Boards, Committees and Councils
 - Members of Boards, Committees and Councils
- Travel
 - Travel

Manuals

- 2013 Trudeau Fellowship Program Description
- 2013 Trudeau Mentorship Program Description
- 2013 Trudeau Scholarship Program Description
- 2013 Visiting Trudeau Fellowship Program Description

Additional Information

Please see the Introduction to this publication for information on access procedures under the provisions of the Access to Information Act and the Privacy Act.

Each request made to The Pierre Elliott Trudeau Foundation, under the Access to Information Act, must be accompanied by an application fee of \$5.00, cheque or money order made payable to The Pierre Elliott Trudeau Foundation.

For additional information about the programs and activities of The Pierre Elliott Trudeau Foundation, please contact:

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Reading Room

In accordance with the Access to Information Act, an area on the premises of this institution has been designated as a public reading room. The address is:

1514 Docteur-Penfield Avenue, 2nd Floor
Montreal, Quebec