



Annual Report

2021-2022



FONDATION
PIERRE ELLIOTT
TRUDEAU
FOUNDATION

**The Pierre Elliott Trudeau Foundation
Annual Report 2021-2022**

ISSN 1918-2406

Legal deposit - Libraries and Archives Canada, 2022

Legal deposit - Bibliothèque et archives nationales du Québec, 2022

Charitable registration number: 895438919RR0001

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.

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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.

By the numbers

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

295 Scholars

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

88 Fellows

Promoting the research and creativity of Canada's top intellectuals and academics

163 Mentors

Connecting eminent Canadians with our Scholars

Mission

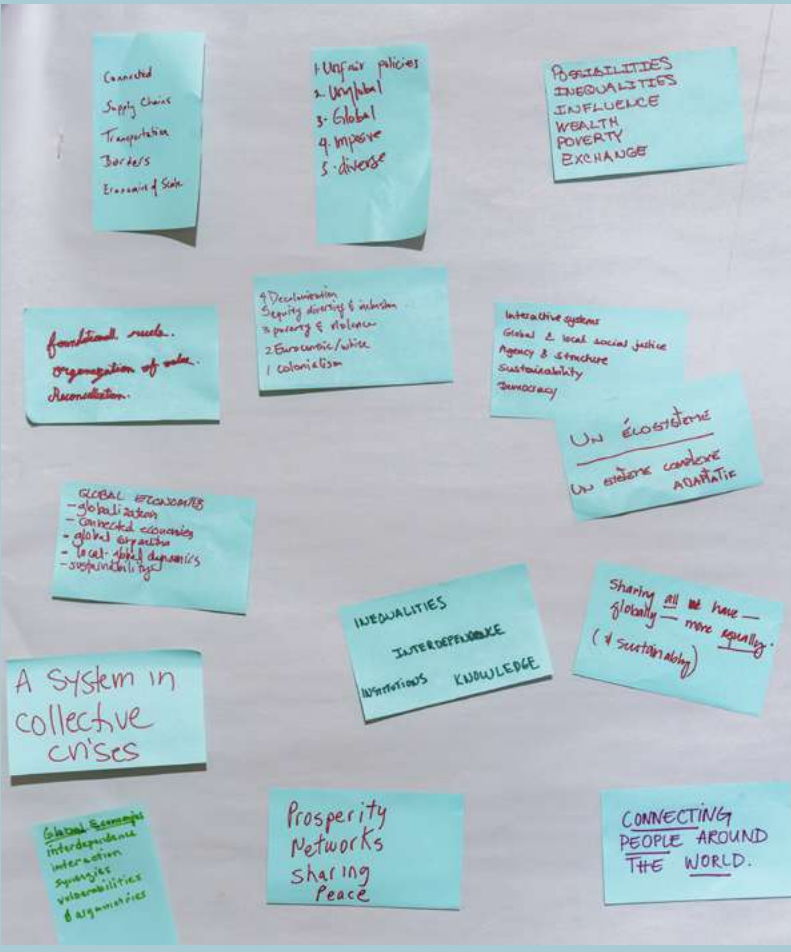
The Pierre Elliott Trudeau Foundation represents much more than a scholarship. We are a gateway for bold, cutting-edge doctoral researchers to become Engaged Leaders who have meaningful impact in their communities and institutions.

The Foundation fosters the development of Engaged Leadership skills through a three-year program centered on curriculum taught by Fellows and Mentors in settings that take Scholars outside of a traditional university setting. By working alongside others who have a diversity of perspectives and come from different backgrounds, Scholars learn leadership by stepping outside their comfort zone.

Beyond providing generous financial support the doctoral research of outstanding Scholars, we support the development of future Engaged Leaders who cultivate innovative approaches as they blaze new trails in the Social Sciences and Humanities.

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Messages



Letter from the Chair of the Members

Looking at events in Canada and across the world this past year - and indeed the last several - it appears that change is the only constant. In this fast-evolving environment, the social, economic, and political issues facing us all continue to grow more complex. Addressing these challenges requires multifaceted and interdisciplinary solutions on a global scale.

From the very beginning, the Members of the Pierre Elliott Trudeau Foundation have sought to reflect the principles that guided the intellectual life and political journey of Pierre Elliott Trudeau. While the Members play an important governance role, appointing Directors to the Board, we serve a role as the keepers of the flame, upholding the legacy of the Foundation's namesake. Indeed, several Members worked directly with Monsieur Trudeau and have a deep, personal understanding of his commitment to Canada and the Foundation's Four Themes: Human Rights and Dignity, Responsible Citizenship, Canada and the World, and People and their Natural Environment.

These themes are as relevant today as they were when the Foundation was established. More so, in many ways. The Foundation and its community members contribute to enriching these discussions on a national scale. It has been enlightening to see the great energy around the Foundation this past year, particularly as we were able to return to in-person gatherings. The programs have renewed purpose, are focused on the Four Themes, and, through our Scientific Cycles, there is renewed understanding of the Foundation's place in promoting curiosity and intellectual engagement within the biggest questions of our time.

In times like our own, the importance of informed and open debate is a keystone of our society. The Foundation's *Brave Spaces* promote such debate and deliver on what the Foundation was meant to become—and I believe Pierre Elliott Trudeau would

have strongly approved. The Foundation's beginnings owe much to his own commitment to engage with a broad range of ideas and commitment to argument. As he himself wrote on the narrowing of perspectives: "Political freedom finds its essential strength in a sense of balance and proportion. As soon as any one tendency becomes too strong, it constitutes a menace." Indeed, we must be fearless to confront today's compelling concerns.

It is my distinct pleasure to Chair the Members, particularly at a moment when the torch is being passed to a new generation of leading Canadians. I thank all Members for their commitment to the legacy of Pierre Elliott Trudeau and to the future of Canada. In particular, I would like to thank Louise Houle, a founding Member who also served as Secretary of the Foundation, for her many years of service, and wish to welcome Maître Danielle Ferron who has taken on this role.

There is much important, creative intellectual research taking place in our institutions of higher learning. The best young scholars need access to the skills required to take their place in broader debates on public policy. They need their voices and research to be amplified. The Foundation is a leading light in providing opportunities to lift these young leaders onto the national and international stage so that they may contribute to the global debates, make their mark, and have an impact.



John English
O.C., FRSC, Ph.D.
Chair of the Members

Letter from the Chair of the Board of Directors

Once again it is our pleasure to provide our Annual Report to Canadians. The appointment of the 2022 cohort of Scholars, Fellows, and Mentors marked the 20th time the Pierre Elliott Trudeau Foundation has recognized some of Canada’s greatest leaders and potential leaders and included them among the ranks of our community. The Foundation was built to endure and, with each passing year, the role the role our intellectual community may play grows increasingly important to us and to Canada.

The model for the Foundation’s programs, engaging top academics and leading Canadians to serve as Fellows and Mentors in service to our Scholars, was ahead of its time. Designed to support the leaders of tomorrow, our program has evolved and changed over the years. The leadership development program outlined in our *Strategic Plan 2019-2024*, and brought into force over the last few years, looks to the future and has realigned our activities in a way that allows the Foundation to deliver on its promise in even more meaningful ways.

The Foundation’s Scholars come from different places, different backgrounds, different experiences, but all participate in our program with curiosity, vigour, empathy, and a readiness to engage with different perspectives. For the Foundation, intellectual and academic freedom are paramount. These values have been built into our programs. Our robust selection process, led by the very committed volunteer members of our Application and Nomination Review Committee, seeks scholars who are ready to embark upon this journey. In my view, our selection process is first class and the Scholars we select reflect the depth and richness of academic leaders across the country. Our support for their innovative and imaginative research will, we hope, better prepare them to approach the increasingly complex public policy questions of our time.

I would like to thank my fellow Directors, notably Lisa Helps, Jennifer Welsh, and one of our longest-

standing Directors, Marc Renaud, who stepped down after years of dedicated volunteer service to the Foundation. On behalf of the Board of Directors, I would also like to offer my appreciation to the Foundation’s President and CEO, Pascale Fournier, and the members of her team, for bringing the Foundation’s mission to life and consistently delivering the highest level of programming and events for our community. Further, I would like to thank our Members, our community of active and alumni Scholars, Fellows, and Mentors, and all those who have helped to shape the Foundation into what it is today. It is a legacy that I believe Pierre Elliott Trudeau would have been proud of.

We are grateful for the dedication and engagement that the members of our community have demonstrated, particularly over the course of these challenging years. The Foundation’s leadership training program continues to support some of Canada’s best and brightest scholars, who have persevered through tumultuous times, continued their studies, and work energetically towards greater ends. I would like to thank our many donors, supporters, and partners, particularly the Government of Canada, who share our vision for a brighter future through engaged dialogue and informed public policy.

It has been said the world needs more Canada. Now more than ever, I also believe this to be true. As the Foundation evolves to become more international in scope, I expect that the members of our community will have the opportunity to engage, exchange, and influence the direction of decisions that affect us all, in Canada and beyond.



Edward Johnson
O.C.
Chair of the Board of Directors
and Founding Member



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Message from the President



Message from the President and CEO

Reflecting on the past year, one of the most important themes has been re-emergence. As the worst of the pandemic appeared to have waned, we began to surface, to gather, and to experience the world as we are meant to. While the year included many challenges, as a community, we began to take steps into what comes next.

For the Pierre Elliott Trudeau Foundation, this reopening is critical for our leadership program which is rooted in experiential learning. Now more than ever, we understand the need for tomorrow's leaders to come together to learn, to be working in their communities, and to come to know, firsthand, the complex systems that make our institutions and our country work.

As the Foundation prepares to mark its 20th year, we welcomed our 2022 Scholars, Fellows, and Mentors into our community. Our Scholars are a new generation of leaders: not only do they count among the next generation of leading academics, but they are also willing to take risks, explore complexity, and engage with diversity and a plurality of perspectives needed to solve today's complex problems. Through our leadership program, the Foundation's Fellows and Mentors offer guidance and training that are the core of the Scholars' leadership journey, encouraging and nurturing their curiosity, their courageousness, and their interest in sharing their knowledge with the world to promote change.

Our programs continue to create Brave Spaces, inviting Scholars to step outside their comfort zones, to listen to one another despite our differences, to embrace diverse ways of knowing, being, and doing, and to move from research to action. How can we create together? How can we collectively build a community in which we may individually recognize ourselves? How do we lead in a context of diverse world views and work together to cultivate an inclusive public imagination?

This came to life in remarkable ways at a community gathering in Quebec City with the 2021 Scholars, Fellows, and Mentors entitled « An Experiential Journey of Heritage in Quebec City: Stories of Language, Culture and Identity ». Using this first gathering as a starting point, members of the cohort explored the political, social, and legal realities of language, while also considering its interrelationship with culture and identity, across generations, geographical boundaries, a plurality of voices, and shifts towards digital platforms. At the Pierre Elliott Trudeau Foundation, the cycles intersect, intermingle, and sometimes even collide, and they all produce something unique and essential to our societies: the democratization of knowledge and openness to others.

At our *Institute of Engaged Leadership* in Moncton, New Brunswick, our 2021 Scholars held hands-on workshops with provincial leaders from politics, business, and the arts, offering guidance on important questions of public policy. In Winnipeg, we experienced with the 2020 cohort a public conference on “Art, Activism, and Advocacy” integrating dialogue and knowledge-sharing on technology, ethics, leadership of self, leadership among others, and leadership within systems. More recently in Quebec City, our community celebrated Indigenous culture alongside Quebec's eleven Indigenous Nations at the KWE! Festival, with a focus on Indigenous language learning.

The Foundation itself continues to lead through its one-of-a-kind programs. In recent years, our community has benefited from support to learn Canada's official languages as well as Indigenous languages. In the past year, we introduced a study plan for active community members that dedicates a portion of their financial support specifically to language learning to encourage greater understanding and leadership through language. From Trois-Pistoles in Quebec to Acadian communities in New Brunswick to the



MESSAGE FROM THE PRESIDENT

Université Sainte-Anne in Nova Scotia, our Scholars learned French through multidisciplinary and multicultural discussions. But there is more. They also complemented their leadership program by learning Indigenous languages, from Cree to Mohawk to Innu. Language, we believe, makes leadership more inclusive. It helps create relationships and build trust. We believe that preparing young leaders to be visionary and brave inevitably involves learning to collaborate with others, including in their own languages, in addressing today's global challenges.

While our programs elevate leaders within Canada, the Foundation is also fostering relationships and creating opportunities internationally. Building on our participation in the Global Fellowship Forum, a collective of scholarship organizations from around the world, we continue to forge new partnerships, most recently with the Association nationale France-Canada, to promote interdisciplinary young leaders and take collective action to create an inclusive Francophonie.

At this critical moment in time, it is fitting that *Global Economies* is the scientific theme guiding our 2022 Scholars, Fellows, and Mentors. As the world's geopolitical tectonic plates continue to move, there is an opportunity for Canadians to play an important leadership role. The Foundation will continue to seek new platforms for the members of our community to take the world stage and broaden their horizons. We thank our network of supporters, partners, and, most importantly, the staff and the members of our community for allowing the Foundation to deliver on its ambitions and to continue empowering Scholars on their journey to have a meaningful impact locally and internationally.



Pascale Fournier

Ad. E., Ph.D.

President and CEO



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Strategic Plan



Strategic Plan 2019–2024

Following from the *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. The Strategic Plan, which draws from the inspirational themes of Inclusive Excellence and Engaged Leadership, comes as a paradigm shift 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. 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.



Inclusive Excellence and Engaged Leadership

The conclusions which were drawn from these consultations informed the development of our *Strategic Plan 2019-2024*, as well as inspire its focus on Inclusive Excellence and Engaged Leadership.

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. Our definition of diversity includes gender, race, disability, language, socioeconomic background, Indigenous knowledge, region of origin, as well as a plurality of perspectives.

We believe that greater diversity and exposure to a plurality of perspectives bring excellence by broadening one’s understanding of the world, encouraging dialogue and engagement across difference, ultimately fostering creativity and innovation, factors that also contribute to improving research and advancing public debate.

Engaged Leadership

The Pierre Elliott Trudeau Foundation’s desire to develop Engaged Leaders reflects a 21st-century vision of leadership that expands profound curiosity about people and ideas, and encourages a willingness to be challenged and take risks while learning how to collaborate across a plurality of perspectives. The Foundation’s unique Leadership Curriculum seeks to build on Scholars’ existing skills and strengths by offering opportunities that are stimulating and challenging, and that purposefully move one outside of one’s traditional comfort zone.

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



Leadership Program

Building Brave Spaces: The Path to Engaged Leadership

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.

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.

To successfully address Canada’s social, political, cultural, health, economic, and environmental issues, and build a more prosperous, harmonious, and sustainable co-existence, leaders must work in an environment marked by a plurality of perspectives. This requires strong Engaged Leadership skills.

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 Cycles

The Foundation's unique Leadership Program builds on Scientific Cycles. 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. In consultation with its members and trustees, the Foundation has selected the following Scientific Cycles for its 2020, 2021, and 2022 cohorts:



2020-2023

Technology and Ethics

Our 2020-2023 Scientific Cycle aims to explore the ethical and social issues raised by contemporary technologies, particularly in the fields of biotechnology and artificial intelligence. Central questions for this cycle include: How is humanity being shaped by recent advances in these areas and how can they be shaped according to ethical principles? This theme was the focus of virtual events in the summer and fall of 2020 and in the winter and spring of 2021, as well as an event in Winnipeg in the spring of 2022. It was also the subject of a series of articles written by 2020 Fellows and Mentors, published on the Foundation's website in fall 2022.



2021-2024

Language, Culture and Identity

The 2021-2024 science cycle focuses on the close connections between language, culture, and identity, across countries of the world and across disciplines. Specifically, this theme includes profound questions about how modern society can better accommodate linguistic pluralism and associated identity politics issues across Canada and the world, and how these language policy frameworks might serve as models for other countries that are also trying to recognize the importance of linguistic pluralism and its place in increasingly multicultural contexts. This theme was the focus of both event in Quebec City, *An Experiential Journey of Heritage in Quebec City: Stories of Language, Culture and Identity*, event in the fall of 2021 and the *Institute of Engaged Leadership* held in Moncton, NB, in the spring of 2022.



2022-2025

Global Economies

The 2022-2025 Scientific Cycle, *Global Economies*, will allow Scholars to explore, from the perspective of commerce, the economic implications of such major trends as the power shift in global economies, the growth of the digital economy, the widening of economic inequalities, and the global health and socio-economic crisis caused by the COVID-19 pandemic, which has disrupted supply chains and highlighted the vulnerability of an integrated global economy. This theme will allow members of the Foundation community to reflect on what the future of the global economy might look like for a prosperous and equitable Canada and world. This theme was discussed at an initial gathering of the 2022 cohort in and around Montreal, QC, in June 2022.

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Programs Overview



Highlights

The Foundation received 471 applications, interviewed 72 semi-finalists, invited 30 finalists for individual interviews, and named 13 Scholars in 2022.

Along this path, candidates responded to challenging questions, participated in group interviews, analyzed case studies, and were assessed by the Application and Nomination Review Committee (the “ANRC”), composed of leading academics and Foundation alumni, during their final assessment in March.

The Foundation currently funds 80 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 2021-2022, the Foundation invested \$2.1 million in the Scholarship Program (including the travel and networking allowance of \$0.8 million).

“As I look at the efforts of our Scholars to think, to listen, and then to propose recommendations in their own language or in the language of others, I realize, in these moments of light and intelligence, and with pride, how much we manage, on a daily basis, to bring to life the fundamental mission of the Foundation. If we are so often in reflection, it is with the intention of always being more action oriented.”

Pascale Fournier
President and CEO

In 2022

In 2021-2022, the Foundation invested

\$2.1 million in the Scholarship Program, including the travel and networking allowance

\$0.35 million before accounting adjustments to its Fellowship and Mentorship programs, including travel and networking allowances

Scholars	Fellows	Mentors
13 new Scholars	4 new Fellows	6 new Mentors
30 finalists interviewed by the ANRC	18 Fellow candidates assessed	44 Mentor candidates assessed
471 applications reviewed	24 active Fellows	26 active Mentors

1. Doctoral Scholarships

Our doctoral Scholarship is unique in Canada for its scope and stature. Last year, thirteen scholarships were awarded to Canadian and foreign doctoral candidates pursuing research related to one of the Foundation's four founding themes. These remarkable Scholars were chosen based on their academic excellence, leadership and engagement, willingness to engage with a plurality of perspectives, and their agility and resilience.

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.



2. 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, strong academic mentoring skills, and their innovative approaches when it comes to understanding important issues facing society. Fellows are also invited based on the relevance of their work, knowledge, and experiences to the scientific theme. Fellows play an active role in the leadership development of our doctoral Scholars, supporting their journey towards 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.



3. 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.



4. Public Interaction Program

The Foundation's Public Interaction Program (PIP) builds on the expertise of the international network of individuals selected through our three 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, podcasts, 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 ("Institutes"), immersing Scholars in leadership training and introducing them to ideas and experiences they may not otherwise encounter in a university context. In the context of the COVID-19 pandemic, this leadership training was provided virtually as the *Spaces of Engaged Leadership*. All these training events were led by the Foundation's Fellows, leaders in research and teaching, and Mentors, leaders and innovators from across the public, private, and nonprofit sectors.

This year, the Foundation held its first gathering with the 2021 cohort in Quebec City and launched a new Institute in Moncton with the 2021 cohort on *Language, Culture and Identity*. The Foundation also invited the 2020 cohort to participate at a public event in Winnipeg on the themes of art and activism as well as technology and ethics. To mark the graduation of the 2019 cohort, the cohort and members of the community were invited to attend the KWE! Festival in Quebec City.

Finally, a banquet dinner took place at the Grand Quay of the Port of Montreal to welcome the new 2022 cohort of Scholars, Fellows, and Mentors, during which renowned guests eloquently shared their first thoughts on the theme of *Global Economies*. This event was followed by an immersive retreat from June 28 to 30 at the Centre de villégiature Jouvence, in the Eastern Townships.

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BilingualismPlus



BilingualismPlus: a better understanding of Canada through exchanges in its official languages and Indigenous languages

Since the inception of the Foundation, a consistent goal has been to break down barriers to intellectual exchange and discourse in the humanities and social sciences across Canada.

To this end, the Foundation recognizes that knowledge of multiple languages is a hallmark of leaders, academics, public intellectuals, and innovative thinkers, and is a strength and advantage both professionally and personally. Understanding Canada’s official languages (French and English) enriches the Scholars’ experience in the multilingual context of Foundation events and allows them to better understand Canada.

The Foundation further recognizes the past exclusion of Indigenous languages from much of Canadian academia and wishes to support Indigenous languages as an integral part of Canada’s historic and future development.

For Scholars who do not speak both official languages, the Foundation offers measures to improve their knowledge of the official language with which they are least comfortable, by taking formal or informal training.

Scholars also have the opportunity to familiarize themselves with one or more Indigenous languages through activities organized by the Foundation, and to follow, if they wish, more in-depth training in an Indigenous language.

Overview of achievements in 2022

3 out of 4 active Scholars

are currently taking courses to learn or improve their knowledge of the official language in which they are least proficient (Scholars from the 2020, 2021, and 2022 cohorts)

1 in 3 active Scholars

has begun learning an Indigenous language

23%

of the Foundation’s active Scholars consider themselves to be bilingual in English and French



The Foundation offers a generous annual allowance to cover the learning of one of Canada’s two official languages and Indigenous languages through training in Quebec, New Brunswick, or Nova Scotia. In 2022, **Roxana Akhmetova** and **Chanelle Robinson**, both 2021 Scholars, chose to participate in a French immersion stay in Trois-Pistoles, QC.

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Inclusion and Respect for Indigenous Heritage



The Foundation is committed to responding to the Truth and Reconciliation Commission of Canada's¹ Calls to Action in its activities, programs, and policies. Greater inclusion of Indigenous peoples, the recognition of their diverse knowledge such as oral and local traditions, and the acknowledgement of their cultures and knowledge are crucial steps in the context of reconciliation in Canada.

It is in this spirit that the Foundation has, since its inception, integrated activities and experiences allowing the different cohorts to visit numerous communities across Canada¹ in order to increase their knowledge and to immerse themselves in the cultures and knowledge of the First Nations, Inuit, and Métis.

In 2022, the Advisory Committee on Diversity worked on a procedural recommendation to recognize the heritage of First Nations, Inuit, and Métis candidates and to honour their special status in the Foundation's selection process. This recommendation will be based on a report compiled by Mélanie Vincent, a member of the Huron-Wendat Nation and Strategic Advisor to the President on Indigenous Affairs, which examines best practices in community-based approaches to affirming Indigenous heritage.

1. THE TRUTH AND RECONCILIATION COMMISSION OF CANADA. Honouring the Truth, Reconciling for the Future : Summary of the Final Report of the Truth and Reconciliation Commission of Canada. Winnipeg, 2015.



Lorna Wanosts'a7 Williams

Ph.D.
2021 Fellow

Nkwelutenlhalha - Our Language

Lorna Wanosts'a7 Williams

Indigenous Languages and the United Nations Decade of Indigenous Languages 2022-2032

In April, Canada launched the United Nations Decade of Indigenous Languages with an official celebration. The event was chaired by Perry Bellegarde, President of the Royal Canadian Geographical Society. Governor General Mary Simon delivered the opening address in three languages: Inuktitut, English, and French.

Another highlight was the performances by First Nations artists who sang and spoke in their own languages. They switched from their Indigenous language to English or French with remarkable ease. One of the speakers, Chief Willie LittleChild, developed the Year of Indigenous Languages 2019 project with the help of British Columbia through the work of Edward John.

The Year of Indigenous Languages 2019 has shown us how such a proclamation can positively influence Indigenous languages here in Canada, and how the connections made with Indigenous peoples around the world can create strong partnerships and collaborations. Leaders and the general public were also able to better understand the importance of heritage languages from all corners of the world. In 2019, Canada passed its Indigenous Languages Act, an opportunity to push for the recognition of ...

... all Indigenous languages and to establish processes to support these languages for reclaiming, revitalizing, and sustaining them, and to finally recognize that these languages existed on our territories before colonization. An Indigenous Languages Commissioner has been appointed to implement this new law.

One of the activities of 2019 was the co-hosting of a global Indigenous language conference, HELISET TFE SKÁL (“Let the Languages Live”), co-hosted by First Peoples’ Culture Council and First Peoples’ Cultural Foundation in Victoria, British Columbia. In conjunction with this conference, UNESCO held meetings on Indigenous languages, while attending the Heliset conference in between meetings. This experience informed their vision for the establishment of the Decade of Indigenous Languages. The First Peoples’ Cultural Council and the First Peoples’ Cultural Foundation were also invited to present keynote addresses at the 2019 UNESCO Conference on Indigenous Languages and Technologies in Paris to conclude the Year of Indigenous Languages.

What do we hope to achieve for Indigenous languages in the next decade? Our work is to address the need for reclaiming, revitalizing, and preserving all First Peoples’ languages by working with Indigenous peoples, who have taken the lead on this broad mandate. This is critical because when Indigenous people take the lead, efforts are more likely to be sustained and follow an Indigenous method of doing the work. Countries need to work with Indigenous peoples to change and evolve the structures of

institutions created to serve society.

For example, in education, which has evolved to implement the value and knowledge system of the Euro-Western world, changes will need to be made to identify First Nations structures, values, and knowledge. This means learning to listen to each other and to build new structures together, respecting and honouring all the complexities and beauty of different ways of being in the world.

UNESCO recently held a World Higher Education Conference. It included a session on Indigenous knowledge, in which speakers emphasized the need for change to create respectful spaces—within the university environment—for Indigenous knowledge and languages. Currently, in Canada, there is no place to learn Indigenous languages, prepare teachers, and study languages from an Indigenous perspective. As young people re-learn their languages, learn on their lands and in their traditions, we need to support them by hiring qualified teachers, leading Indigenous-owned research, understanding, and countering colonial habits in learning and expectations. This conversation is just the beginning, and we have ten years to work together to come up with creative and respectful innovations.



Democratizing knowledge and sharing knowledge

Responding enthusiastically to the objectives of the Strategic Plan, members of the Pierre Elliott Trudeau Foundation community are committed to sharing their knowledge and expertise with decision-makers and the public.

The Foundation is proud to highlight some of the accomplishments of its community members in honour of and in conjunction with National Indigenous History Month in June, National Indigenous Peoples Day on June 21 in Canada, the National Day for Truth and Reconciliation on September 30, and the launch of the International Decade of the World's Indigenous Languages from 2022 to 2032.



Marie Ann Battiste
2019 Fellow

Congratulations to Professor Marie Ann Battiste, R.S.C., O.C., a member of the Mi'kmaq Nation, who was awarded the Order of Canada in May 2022. Professor Battiste was recognized for her fundamental contributions to research and teaching of Indigenous knowledge and language. The Foundation would also like to thank Professor Battiste for organizing a Foundation-funded national virtual forum on Indigenous Knowledge Systems in the Canadian Academy: Experiences, Opportunities, Risks, on April 28, 2022, which brought together more than 100 online participants.

We would also like to acknowledge Professor Lorna Wanosts'a7 Williams, O.C., 2021 Fellow, Professor Emeritus of Indigenous Education, Curriculum, and Instruction at the University of Victoria and Canada Research Chair in Education and Linguistics, who was instrumental in preparing the proclamation and launch of the International Decade of the

World's Indigenous Languages. Professor Williams, President of the First Peoples' Cultural Foundation, participated in and provided remarks at the national launch of the Decade of Indigenous Languages, hosted by the Canadian Commission for UNESCO, the Royal Canadian Geographical Society, and the Canada Council for the Arts in Ottawa on April 22, 2022. She was also interviewed by CBC Radio to discuss her thoughts on the Decade and the importance of language revitalization. Finally, on May 18, 2022, Professor Williams moderated a panel and dialogue entitled "An Indigenous Perspectives Circle on the future of Higher Education" at the UNESCO World Higher Education Conference 2022 in Barcelona, Spain.

Panel and Circle Discussion on Indigenous Knowledge and Languages

Fellows Marie Battiste (Lnu educator) and Lorna Wanosts'a7 Williams (Lil'watul educator), also participated in a panel and circle discussion on National Indigenous Peoples Day, June 21, 2022, in Quebec City. Their conversation focused on the Declaration of the Rights of Indigenous Peoples, the UNDRIP Act of 2021, and the opportunities presented by the beginning of the International Decade of Indigenous Languages 2022-2032. This session explored the desires, aspirations, and responsibilities of all participants to engage in true personal, professional, and community leadership over the next decade.



8

Public Interactions



Overview of Public Interactions



Memorable first gathering of the 2021 cohort

OCTOBER 2021

We had the pleasure of attending a memorable event together, *An Experiential Journey of Heritage in Quebec City: Stories of Language, Culture and Identity*, from October 12 to 15. This activity brought together the 2021 cohort, selected last summer to pursue the scientific theme *Language, Culture and Identity* over the next three years. Using this first gathering in Quebec City as a starting point, members of the cohort explored the political, social, and legal realities of language, while also considering its interrelationship with culture and identity, across generations, geographical boundaries, a plurality of voices, and shifts towards digital platforms.

Institute of Engaged Leadership, New Brunswick

APRIL 2022

During this last major event in 2019 before the outbreak of the COVID-19 pandemic, we were all looking forward to the 2022 Institute on *Language, Culture & Identity*, held in New Brunswick with most of the 2021 Scholars, Fellows, and Mentors, as well as with many distinguished guests.

This *Institute of Engaged Leadership* was undeniably one of the greatest journeys into the heart of language, its plurality and tenacity, and has allowed us to ask some compelling questions. We spent an incredible week travelling around New Brunswick to better understand the relationship between language, culture, and identity. From Moncton to Miramichi to Memramcook, from Acadian culture to that of the Elsipogtog First Nation, we walked through the linguistic, cultural, and identity soil of the province, from large amphitheatres to small community spaces.





Global Fellowships Forum, New York

MAY 2022

Our collective efforts in the past years to expand the Foundation’s international network led to the participation of the Foundation last May at the Global Fellowships Forum in New York, co-hosted this year by the McCall MacBain Foundation and the Posse Foundation.

This forum brought together representatives from eight of the most prestigious organizations that offer generous scholarships to the most exceptional students and emerging leaders around the world, including: Knight-Hennessy Scholars, the McCall MacBain Foundation, the Loran Scholars Foundation, the Posse Foundation, the Mandela Rhodes Foundation, the Rhodes Trust, Schwarzman Scholars, and the Pierre Elliott Trudeau Foundation.

Winnipeg Event & Conference

MAY 2022

We were delighted to welcome our 2020 cohort of Scholars, Fellows, and Mentors to Winnipeg from April 29 to May 2 for 2020 Mentor Bob Haverluck’s groundbreaking event and conference, *Art, Activism & Advocacy*. This very enriching conference was the first opportunity for this cohort to meet in person since the beginning of the COVID-19 pandemic. The event integrated dialogue and knowledge-sharing on technology, ethics, leadership of self, leadership among others, leadership within systems, French and Indigenous languages, laws, identities, arts, advocacy, and activism. This event also transported us in an immersive experience that typifies the experiential learning objectives of the Foundation’s Engaged Leadership program.



Community gathering in Montreal and Jouvence

JUNE 2022

During a first community gathering beginning June 27, the new 2022 cohort of Scholars, Fellows, and Mentors was welcomed at the Grand Quay of the Port of Montreal for a banquet dinner at which renowned guests eloquently shared their first thoughts on the theme of *Global Economies*. This event was followed by an immersive retreat from June 28 to 30 at the Centre de villégiature Jouvence, in the Eastern Townships.





New Brave Spaces Podcast Series on Diversity

AUGUST 2022

In early August, the Foundation launched a new *Brave Spaces* podcast series on the theme of Diversity, one of its six key concepts of leadership identified in the Foundation's Leadership Curriculum.

Through eight conversations, at times uncomfortable but nevertheless necessary, Dr. Margarida Garcia (2004 Scholar and Chair of the Foundation's Advisory Committee on Diversity) explored with Scholars, Fellows, and Mentors of the Foundation's Advisory Committee the possible blind spots and unintended consequences of unintended consequences of equity, diversity and inclusion while trying to present a plurality of perspectives...at the risk of taking the listeners out of their comfort zones.

Learning and Integration Collection on Language, Culture and Identity

OCTOBER 2022

Language and languages are at the heart of the Pierre Elliott Trudeau Foundation's 2021-2024 Scientific Cycle. The contemporary multidisciplinary issues related to language and languages are numerous. First, there is the need to preserve linguistic diversity. In Canada, we also encounter issues such as bilingualism, multilingualism, and everything that is found in the spaces and interstices of what are called official languages.

This compendium of learning and integration of the Language, Culture & Identity Scientific Cycle, brilliantly informed by the individual but complementary views of the Fellows and Mentors of the 2021 cohort, allowed our Scholars to deepen and broaden their reflection and enrich their upcoming 2024 Impact Conference!



9

Community Mobilization and Engagement



Advisory Committee on Diversity

Diversity for Engaged Leadership

The Pierre Elliott Trudeau Foundation is committed to promoting equity, diversity, and inclusion, and to creating and cultivating an environment that recognizes and celebrates that diversity. In the *Strategic Plan 2019-2024*, diversity is recognized as one of the key traits associated with committed leadership and fostering understanding, openness to difference, creativity, and innovation.

The Foundation recognizes diversity in terms of gender, race, disability, language, socio-economic background, Indigenous knowledge, and region of origin, as well as diverse perspectives, as principles integral to its work. It also believes that diversity fosters excellence and encourages dialogue and engagement with diverse perspectives and opinions that challenge conventional approaches.

Committee members are seen and heard

Over the course of the year, Committee members collaborated on recording a series of video vignettes designed to express the goals of the Foundation's *Code of Community Engagement*, as well as the benefits associated with diversity, multiple perspectives, and *Brave Spaces*. These vignettes have been distributed through social media and are available on the Foundation's website.



The Committee also produced a series of podcasts on the theme of equity, diversity, and inclusion (EDI). Margarida Garcia, Chair of the Committee, hosts the podcast series as an open and transparent conversation with guests whose professional and personal perspectives and experiences are touching, diverse, and compelling.

The Foundation would like to acknowledge the contribution of our valued sponsors for making this series possible. We would also like to graciously acknowledge the generous contributions of the University of Ottawa, the University of Calgary, and York University.

The Committee is made up of active and alumni members of the Foundation community who are leaders in their respective fields and communities. As a group, they reflect all aspects of diversity at the heart of the Foundation's work.

Members of the Advisory Committee on Diversity
as of August 31, 2022:



Margarida Garcia, Ph.D.
2004 Scholar
Committee Chair



Caroline Leblanc
2019 Scholar



Lydie C. Belporo
2021 Scholar



Poonam Puri
2016 Fellow



Magaly Brodeur, Ph.D.
2009 Scholar



Bernard Richard
2012 Mentor



Mary Anne Chambers
2018 Mentor



Romeo Saganash
2005 Mentor



Randall Harp, Ph.D.
2020 Fellow



Darren (Daz) Saunders
2019 Scholar



Patti LaBoucane-Benson, Ph.D.
2004 Scholar



Jamie Snook, Ph.D.
2017 Scholar



**Dawn Memee
Lavell-Harvard, Ph.D.**
2003 Scholar



Charlie Wall-Andrews
2020 Scholar



Alumni Network

The Pierre Elliott Trudeau Foundation takes great care in maintaining its relationships with its outstanding community of alumni Scholars, Fellows, and Mentors, including inviting them to organize or participate in events, serve on strategic committees, and, in some cases, serve on the Board of Directors. The Foundation is committed to maintaining an ongoing relationship with alumni and involving them in its activities in Canada and around the world.

In keeping with its *Strategic Plan 2019-2024*, the Executive Committee of the Alumni Network strives to include a balance of English- and French-speaking representation, Indigenous representation and gender parity, and to generally reflect the diversity of the Foundation's community. The Executive Committee of the Alumni Network brings perspectives from across Canada and beyond through its members based in various locations across the country and abroad.

Alumni Newsletter 2021

This new edition of the Foundation's Alumni Newsletter was published in November 2021. Co-editors Libe García Zarranz and Sophie Thériault were looking for a critical and creative exchange on joy from an aesthetic and ethical point of view. They issued a call for contributions with three main questions: How can we create collective spaces of joy in difficult times? Can joy be a subversive tool of resistance? Can joy lead to transformative social change? These big questions inspired several community members to contribute to this rich discussion and to share their vision in the newsletter.



Communication and Knowledge Sharing: a new podcast series

Over the course of 2022, members of the Executive Committee of the Alumni Network led the production of a new series of twelve *Brave Spaces* podcasts, on the theme of Communication and Knowledge-Sharing, one of the six key concepts of the Foundation's Leadership Program. Committee Co-chairs Sophie Thériault and Robert Leckey host this insightful series of podcasts in French and English with a diverse group of individuals who share their experiences and thoughts, both personal and professional, on the benefits and ways to optimize communication and the importance of welcoming and sharing knowledge. The podcasts were released at the end of 2022.

On behalf of the entire community, the Foundation would like to warmly thank and acknowledge the commitment and generosity of the newsletter's co-editors, the members of the Executive Committee of the Alumni Network, the hosts of the podcast series, as well as all the members who have participated or contributed in any way to the creation of this content, which makes it possible to share knowledge and strengthen the ties of the network and the entire community.

The Committee is made up of former Scholars, Fellows, and Mentors from the Foundation's community who are wonderful ambassadors. On behalf of the entire community, the Foundation would like to thank them and acknowledge their generous contributions.

Members of the Executive Committee of the Alumni Network as of August 31, 2022



Milad Parpouchi, Ph.D.
2017 Scholar
Committee Co-chair



Libe García Zarranz, Ph.D.
2010 Scholar
Newsletter Co-editor



Sophie Thériault, Ph.D.
2003 Scholar
Committee Co-chair,
and Newsletter Co-editor



Patti Laboucane-Benson, Ph.D.
2004 Scholar



Alain-G. Gagnon, Ph.D.
2010 Fellow



Jean Lebel, Ph.D.
2016 Mentor

10

Community Spotlights



COMMUNITY SPOTLIGHTS



**Prativa
Baral**
2021 Scholar

Prativa is an epidemiologist, a social scientist, and a doctoral student at the Johns Hopkins Bloomberg School of Public Health. She operates at the intersection of epidemiology and policy and is passionate about making science accessible and digestible.

“I have received so many takeaways from the trip in Quebec City. It was incredibly wonderful and such a breath of fresh air to be surrounded by people who don’t necessarily think like me, but in doing so, forced me to leave my comfortable little bubble and think about things in a more inquisitive manner.”



**Raphaël
Grenier-Benoit**
2021 Scholar

Raphaël Grenier-Benoit is a doctoral student at the University of Oxford, Faculty of Law, where he conducts research under the supervision of Professor Richard Ekins. Fascinated by issues at the intersection of law, politics, and morality, his research focuses on constitutional interpretation and on the role of the judiciary in harmonizing law to social change.

“Being part of a diverse and stimulating community, like that of the Foundation, will expose me to a diversity of perspectives and will allow me to have a better grasp of the important social questions at the heart of my research.”



**Leah
Carrier**
2020 Scholar

Leah Carrier is a Niitsitapi registered nurse and doctoral student at Dalhousie University. Her doctoral research uses a Two-Eyed Seeing approach to examine the impact of cultural connectedness on mental health outcomes and how cultural interventions can be implemented with Indigenous children and youth.

“In order to have an impact, I believe that engaged leaders must be willing to go beyond the borders of the ivory tower and build relationships with the communities and land where we work, learn, and play. Engaged leaders are driven by their lived experiences, education, and community accountability to make sustainable change in addressing social issues.”





Stéphanie Chouinard
2021 Fellow

Stéphanie Chouinard, Ph.D., is an Associate Professor in the Department of Political Science at Royal Military College (Kingston) and Queen’s University whose research is focused on the field of language rights, minority and Indigenous rights, and law and politics. She teaches in Canadian politics, comparative politics, and political geography.

“Often in Canada, we tend to think of language as a pure communication tool. But language, it’s so much more than that! It’s a whole world, it’s a whole universe that opens up to us when we learn a new language. For me, leadership in linguistic matters in Canada is to reach out to each other and to establish a dialogue, not only in matters strictly reserved to language but also regarding culture and politics.”



Glenn Cohen
2020 Fellow

Professor Glenn Cohen, is one of the world’s leading experts on the intersection of bioethics (sometimes also called “medical ethics”) 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. He is the author of more than 150 articles and chapters and the author, co-author, editor, or co-editor of more than 15 books.

Artificial Intelligence, Medicine, Bias, and Ethics

Glenn Cohen

Artificial intelligence (AI) is increasingly touching every facet of our society, including transportation, the stock market, dating, and health care (where I focus my work). As AI makes its way into medical devices, hospital readmission algorithms, iPhone apps that scan moles to determine if you should see a dermatologist, etc., the public is being increasingly exposed to everything that can go wrong. Among the most worrisome aspects of AI implementation are its potential for bias.

Let’s focus on racial bias, because it is one of the most prominently discussed, but bias can

affect many other groupings in a population. The easiest bias problems to understand involve training data. Imagine that an app for use on a phone uses a photo of your skin to help you determine if you have a skin condition that merits follow-up by a dermatologist. But if the training data lacks enough representation by individuals of darker skin tones, the app may perform poorly for those populations. Testing for this kind of racial bias is relatively straightforward. Correcting for it is more difficult and involves a combination of participatory design (that engages with underrepresented ...

... communities to encourage their participation) and requiring/incentivizing the maker of AI to make their training datasets representative of the communities on whom these models will be deployed.

Even with a data set that is completely representative of the population on which it will be used, though, bias can creep in. A good example is so-called “label bias.” A well-known study published in a 2019 paper demonstrated this bias through a widely used algorithm that sought to improve the care of patients with complex health needs by providing increased follow-up care and other resources. The authors showed that the decision to have the algorithm (which actually excludes race as a variable) use health care costs as a proxy for health care needs, a decision that was not prima facie unreasonable, led to an algorithm that prioritized White patients over Black patients at the same level of health needs. Why? Because in the training data, on average, Black patients generated lower costs than White patients at the same health level because less money was spent on Black patients. By prioritizing patients at higher cost, it was not prioritizing patients at higher health needs, and this gap had a racially discordant effect. This cost differential itself may reflect pre-existing patterns of care seeking and providing, which may themselves raise normative issues.

Developers should look for AI bias and take all feasible steps to make it less biased. But what should they do if some bias persists or we hit harder trade-offs between bias-reduction and other values (an interesting example is a “fix” that would reduce race-discordant results a little but would also make the algorithm significantly less accurate overall)? I think it is important for us to always ask the question “As Against What?” As philosophers sometimes put it, the Perfect should not be the enemy of the Good, and in measuring these technologies we should focus on how AI-enabled health care stacks up to non-AI enabled health care. In the case of bias, we must recognize that physicians and nurses, like human beings, are also often consciously or unconsciously biased including, sadly, showing significant racial biases in the way they treat patients. In evaluating a proposal to introduce a new AI feature into health care, we need apples-to-apples comparison. Even if using the AI to assist produces disparate results between groups, does it produce less biased results than the physician acting without it? Those comparisons are often hard to execute and fraught, but only if we ask the right questions do we have a hope of making progress.



The Honourable Aldéa Landry
2021 Mentor

The Honourable Aldéa Landry is a former politician, a business owner, a volunteer and an advocate for numerous causes. She was among the Top 100: Canada's Most Powerful Women by the Women's Executive Network (2009 and 2010). Among numerous awards and honorary doctorates, she was awarded the Order of Canada in 2006 (C.M.) and received The Queen Elizabeth II Diamond Jubilee Medal in 2012. She is the former Chancellor of Université Sainte-Anne, in Nova Scotia.



The Right Honourable Beverley McLachlin
2020 Mentor

The Right Honourable Beverley McLachlin is a former Justice of the Supreme Court of Canada and served as Chief Justice from 2000 to 2017. She recently called attention to the difficult lessons of the COVID-19 pandemic for the justice system across Canada.

Ethics and the Internet

Beverley McLachlin

The ethical implications of the digital revolution are enormous and complex. Countries around the world, including Canada, are seeking ways to manage them. Some, like Germany, have introduced take-down laws—forcing platforms to take down offensive messages. But leaving aside the spectre of state censorship—itsself raising ethical concerns—many query the effectiveness of this approach; how precisely, can a take-down regime be policed and enforced in a world swirling with billions of messages?

An alternative approach—one recommended in a recent report of the Canadian Public Policy

Forum—is a systemic approach that would focus on increasing the transparency of how platforms and their algorithms transmit messages and increasing the power of users through education and awareness. The hope is that a systemic approach, coupled with enforcement of existing laws against harmful speech by the state and more pro-active policies by platforms, may go some distance to meeting the ethical challenges posed by the digital revolution.

We are right to be concerned with the ethical implications of the digital era. And we need to find solutions.

11 Scholarships



2022 Scholars

In 2022, the Foundation appointed 13 remarkable Scholars based on their academic excellence, leadership and engagement, willingness to engage with a plurality of perspectives, and their agility and resilience.

Our Scholars set themselves apart through critical thinking skills, a willingness to take risks, their profound curiosity, their talent for collaboration and a commitment to building a better and more inclusive world.

Again this year, applications were sent directly to the Foundation rather than being selected by the universities. Through the Foundation's commitment to Inclusive Excellence, this removed barriers for candidates, ensuring that all applicants were given consideration through the Foundation's rigorous selection process regardless of region, background, or discipline.

The Foundation fosters the development of Engaged Leadership skills among its Scholars through a three-year program centred on curriculum taught by Fellows and Mentors, in ways that take Scholars outside of a traditional university setting.

Scholars receive up to \$40,000 annually for three years to cover tuition and reasonable living expenses, plus up to \$20,000 per year through an allowance for research, travel, networking, language learning, and for attending Foundation events alongside other members of our dynamic community.

The Mary-Jean Mitchell Green | Pierre Elliott Trudeau Foundation Scholarship

Thanks to the generosity of Alexander and Andrew Green, the Foundation is pleased to inaugurate the Mary-Jean Mitchell Green - Pierre Elliott Trudeau Foundation Scholarship, which is awarded to an outstanding female doctoral candidate researching in the field of business. As such, the 2021 cohort welcomed the first-ever Mary-Jean Mitchell Green | Pierre Elliott Trudeau Foundation Scholar, supporting the legacy of the Foundation's namesake, particularly through a focus on the Foundation's Four Themes and our Building Brave Spaces leadership curriculum.

The creation of the Mary-Jean Mitchell Green | Pierre Elliott Trudeau Foundation Scholarship represents a watershed moment for the creation of even more spaces in our Scholarship program. As the Foundation continues to seek new and innovative ways to bridge the gap between academic and applied knowledge, generous donors play a key role in helping ensure more potential Engaged Leaders have an opportunity to benefit from our program.

2022 Scholars



David Eliot
Critical Surveillance and Security
Studies - University of Ottawa



Roojin Habibi
Law - York University



Angie Jo
Political Science - Massachusetts
Institute of Technology



Marjolaine Lamontagne
Political Science - McGill
University



Camille Lefebvre
Political Science and Law -
Université Laval/Université Leiden



Michelle Liu
Civil Engineering -
University of Ottawa



**Stéphanie Racine
Maurice**
Psychology - Université Laval



Jamie Michaels
English Literature -
University of Calgary



Coline Moreau
Criminology -
University of Ottawa



Mariame Ouedraogo
Epidemiology -
University of Toronto



Alexandre Petitclerc
Philosophy -
Université de Montréal



**Tobias Gerhard
Schminke**
Political Science -
Dalhousie University



Felix Amoh-Siaw
Social Sciences, Global Studies -
University of British Columbia

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Fellowships



2022 Fellows

In 2022, the Foundation appointed four Fellows who are leading researchers and public educators. Over a three-year cycle, Fellows help lead the Foundation's *Institutes of Engaged Leadership* and contribute their expertise and knowledge by addressing the major issues surrounding *Global Economies*, and provide guidance and support to our Scholars.



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

For a third 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 academic each year to participate in a residential exchange in Canada, co-hosted by the Foundation and the McGill Institute for the Study of Canada. 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.



Johanne Brunet, Ph.D. is full Professor at HEC Montréal since 2005 where she teaches the MBA, EMBA, and at the Executive Education School. She developed the “International Campuses” for her MBA students, which has created opportunities to meet with business representatives in California, Australia, India, and the United Arab Emirates. Her research focuses on creativity and innovation, international marketing, and cultural industries.



Virginia Ann Haufler, Ph.D. *Fulbright Canada-Pierre Elliott Trudeau Foundation Fellow/Joint Chair in Contemporary Public Policy*, is Associate Professor in the Department of Government and Politics at the University of Maryland and former Director of the Global Communities Living-Learning Program. She has presented her work internationally and published widely in addition to consulting for international organizations, government agencies, and non-profit organizations.



Jean-Frédéric Morin, Ph.D. is Full Professor at the Political Science Department and the Canada Research Chair in International Political Economy at Laval University. His research focuses on international institutions that govern the globalization process, particularly with regards to their effects on the environment, culture, and public health. His articles are regularly published in top-tiered political science, economics, and law journals.



Albert Yoon, Ph.D. holds the Michael J. Trebilcock Chair in Law and Economics at the University of Toronto Faculty of Law. Albert writes on legal technology and labour markets within and outside the legal profession. He is also a co-founder of Blue J. Legal, a Toronto-based legal technology start-up that draws upon artificial intelligence to provide instant and comprehensive answers in complex areas of tax, labour, and employment law.

13

Mentorships



2022 Mentors

The Foundation appointed six Mentors in 2022. These accomplished leaders from various professional domains and sectors—private, public, parapublic, and non-profit—reflect a range of skills and offer insights and guidance of prodigious value to future Engaged Leaders.

Mentors teach leadership skills to our Scholars and help them make connections with influential 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 guidance of Mentors, 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.



Dr. Richard Thompson Ford, Ph.D. is a lawyer, a law professor at Stanford University, and an expert in civil rights and antidiscrimination law. He is a prolific author of books on issues of racism, equality, multiculturalism, and the influence of societal norms on social change and justice.



Christiane Germain, a model of female leadership, has paved the way for women both in business and in corporate boardrooms. Named one of the 100 most influential women in Canada for four years running by the Women’s Executive Network, she has received numerous honours and distinctions.



Barbara Grantham brings notable professional experience and success as both a senior executive and consultant. Her career has, in many ways, been aligned with some of Canada’s most important national conversations including mental health and addiction, homelessness, reconciliation, Indigenous health, health care innovation and technology, and women’s and children’s health.



Régis Labeaume has contributed significantly to socio-economic, cultural, and technological growth in Quebec City. Devoted to the promotion of an entrepreneurial culture, he is the co-author of the book *Les innovations dans le monde minier au Québec* (*Innovations in the Mining World in Quebec*) and the guide *Comment acheter une PME* (How to buy a SME).



Mariette Mulaire is an award-winning leader in national and international socio-economic and cultural development, and in the promotion of Manitoban and Canadian Francophonie. She was the President and CEO of the World Trade Centre Winnipeg (2013-2022) and Co-chair of the 2017 Canada Games Host Society.



Monique Smith is a bilingual lawyer with a legacy of achievement in the diplomatic, political, and cultural sectors. Formerly the Minister of Intergovernmental Affairs, of Tourism and of Revenue in Ontario, she was Ontario’s first representative in Washington in 2013.

14

Looking Ahead



LOOKING AHEAD



Knowledge and expertise are infinite in scope. Through its doctoral Scholarship program, the Pierre Elliott Trudeau Foundation has the immense privilege to meet and work with exceptional, daring, and avant garde community members who, day after day, expand, enrich, and amplify intellectual thinking in our society.

As the worst of the pandemic appeared to have waned, we began to surface, to gather, and to experience the world as we are meant to. While the year included many challenges, as a community, we began to take steps into what comes next and were again able to carry on our ideals. This resurgence has quickly become one of the most important themes and will surely dictate the pivotal years ahead. People have an immeasurable ability to learn. Some are blessed with limitless curiosity and a thirst for knowledge that compels them to surpass themselves to understand, learn, discover, inspire, and change while pushing boundaries year after year.

At this critical moment in time, it is fitting that *Global Economies* is the scientific theme guiding our 2022 Scholars, Fellows, and Mentors. As the world's geopolitical tectonic plates continue to move, there is an opportunity for Canadians to play an important leadership role. The Foundation will continue to seek new platforms for the members of our community to take to the world stage and broaden their horizons while innovating and enhancing our leadership program. We are also committed to broadening our horizons and stepping outside our comfort zone so that we can offer our Scholars and the members of the Foundation's community a diverse range of content, perspectives, and experiences that will continue to deepen their intellectual and professional journeys.





2023–2026 Scientific Cycle

Canada in the World: The Future of Foreign Policy

Year after year, the Foundation's Leadership Development Program builds on Scientific Cycles. In practice, the three-year leadership journey for each cohort of Scholars is contextualized by a scientific theme that has interdisciplinary dimensions and reflects a timely and significant set of issues for the future of Canada and the world. The scientific theme is not a substitute for the Foundation's Four Themes; rather, it provides the lens through which these four fundamental themes will continue to be explored.

The Foundation community is currently focused on *Global economies* (2022-2025 Scientific Cycle), *Language, Culture, and Identity* (2021-2024 Scientific Cycle), and *Technology & Ethics* (2020-2023 Scientific Cycle).



In consultation with the Foundation's Members and Directors, the Foundation has chosen *Canada in the World: The Future of Foreign Policy* as the theme for its 2023–2026 Scientific Cycle.

This Scientific Cycle is framed in the context of major changes taking place in the world. This pace of change has accelerated with seismic shifts in technology, an expansion of world actors and cross-regional alignments, as well as climate change, COVID-19, mass migration and refugee movements, rising authoritarianism, major political movements, a mounting global debt, and the changing nature of conflict and security. Increasing political instability, unstable Sino-American dynamics, and polarization in the U.S. have propagated deeply into America's institutions. And while the international community recently responded multilaterally to Russia's invasion of Ukraine, the precariousness of political and economic cohesion has become a concern in countries around the world.

These significant shifts in the global order have put into question the very foundations upon which Canadian foreign policy is based, rooted in multilateralism, collaborative initiatives like the Arctic Council, the promotion of democracy, human rights, and global trade. What are Canada's existing strengths and opportunities that may help carve a path to modernize and reinvigorate its foreign policy and leadership on this evolving world stage?

The 2023 Pierre Elliott Trudeau Foundation Scholars, Fellows, and Mentors and its wider community are thus invited to reflect on key questions by contributing their views and experiences, representing a plurality of perspectives on these issues that may help carve a path to modernize and reinvigorate Canadian foreign policy and leadership on the world stage.

15 Our Partners



Our Partners

Partnership with Fulbright Canada

“My research will examine how the private sector can be held accountable in the context of growing inequality and climate crisis. I look forward to exploring the Canadian perspective especially with respect to natural resource extraction. This is an exciting opportunity to explore contemporary global challenges with a diverse group of scholars and community leaders, and to contribute to mentoring future leaders.”



Virginia Ann Haufler
2022 Fellow

The Association nationale France–Canada

This partnership allows us to carry out joint activities in France, Canada, and across the French-speaking world. By setting up a pilot program, Personalities of the Future, France-Canada/Young Leaders Canada-France, we will be able to pool resources and encourage additional collective activities, focused on the promise of the future.



The Mary–Jean Mitchell Green | Pierre Elliott Trudeau Foundation Scholarship

Kylie Heales is a PhD student in the Alberta School of Business’ Strategy, Entrepreneurship and Management Department at the University of Alberta. Prior to this, Kylie completed her MBA at The Fuqua School of Business at Duke University where she interned at the Bill & Melinda Gates Foundation. She also co-founded a fintech firm during this time.



Kylie Heales
2021 Scholar

Global Fellowship Forum



OUR PARTNERS

Our Donors

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	Marc Lalonde	Poonam Puri	

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 matching funds allow the Foundation to fully deliver on the its mission.

Our Sponsors

University of Calgary

University of Ottawa

York University



“As a lifelong follower of advancements in public policy in Canada, I have spent much of my career contributing to a better understanding of the complexities of our country. The future needs strong and intellectual leaders and I see the Pierre Elliott Trudeau Foundation’s training program as an important force in elevating new ideas to inform the policies of the future. My contribution to the Foundation is meant to support its programs and, in particular, their scholars who will continue to push boundaries and move our country forward.”



Gregory Tardi, J.D.
Donor

“I am a financial supporter of the Pierre Elliott Trudeau Foundation as a way of giving back to an organization that has given me so much. I was a 2012 Scholar. Since then, thanks to the relationships that I made and all that I learned from the Foundation, I founded the Art Canada Institute (ACI), the only national organization to make Canada’s art and its history accessible to all through an online, open-source platform. Today the ACI’s work reaches an audience of over 3 million and over 97 countries. ACI’s values—community, accessibility, innovation, and building a better world—are rooted in the values of the Pierre Elliott Trudeau Foundation’s mission. None of ACI’s work would be possible without the ideas and doors that the Pierre Elliott Trudeau Foundation opened up to me.”



Sara Angel
Donor and Member of the
Development Committee

“A significant donation to the Pierre Elliott Trudeau Foundation was a natural choice to honour my mother who had an interest in business practices across the world, including technological development, working conditions, and the status of women, all of which align with the Foundation’s themes. My family is proud to be associated with this esteemed organization, especially as Mary-Jean was a friend of Pierre’s, as they continue to empower doctoral scholars to have a meaningful impact in the world.”

Alexander Green
Donor



Alexander Green and his brother Andrew Green,
founders of the Mary-Jean Mitchell Green
Scholarship | Pierre Elliott Trudeau Foundation



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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 volunteer to provide fundamental guidance to the Foundation as it carries out its mission.

Members

Members appoint Directors to the Board of Directors, approve changes to the by-laws, and appoint the external auditor. The Foundation's membership is limited to thirty Members. Six seats are reserved for Members appointed by the Minister of Innovation, Science and Economic Development Canada ("ISED") and another three seats are reserved for the liquidators of the succession of the late Right Honourable Pierre Elliott Trudeau.

Serving between September 1, 2021, and August 31, 2022:

Regular Members

Thomas Axworthy
Denise Chong
John English, Chair of the Members
Danielle Ferron (as of December 9, 2021)
Ron Graham
Sacha Haque
Louise Houle (until November 22, 2021)
Edward Johnson
The Right Honourable David Johnston
Frederick H. Lowy
Bruce McNiven
Farah Mohamed
Mayo Moran
Robert Murdoch
Hilary Pearson
Patrick Pichette
Sean Riley
The Honourable Roy Romanow
Peter Sahlas
Nancy Southam
Stephen Toope

Government-appointed Member

Dennis Browne

Succession Members

Alexandre Trudeau
Justin Trudeau*

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

Honorary Members

The Honourable Marc Lalonde
Joe MacInnis

Board of Directors

Directors manage or supervise the management of the activities and affairs of the Foundation. They are elected by the Members of the Foundation for renewable, two-year terms. 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 Right Honourable Pierre Elliott Trudeau.

Serving between September 1, 2021, and August 31, 2022:

Directors appointed by the Regular Members

Dyane Adam
 Françoise Bertrand (as of February 18, 2022)
 Martha Durdin
 The Honourable Myra Freeman
 Lisa Helps (until November 20, 2021)
 Jameel Jaffer
 Edward Johnson, Chair of the Board of Directors
 Bruce McNiven
 Bessma Momani
 Madeleine Redfern
 Duncan Reid
 Patrick De Roy
 Jennifer Welsh (until December 11, 2022)
 Sanni Yaya

Director appointed by the Government-appointed Members

Marc Renaud (until November 20, 2022)

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

Sarah Coyne
 Peter Sahlas

Application and Nomination Review Committee (ANRC) for the 2022 Selection Process

Mona Nemer, Chair
 Dyane Adam
 Thomas Axworthy
 Mary Anne Chambers
 John English
 The Honourable Paul Favel
 The Honourable Myra Freeman
 Margarida Garcia
 Ginger Gibson
 Jennifer Hall
 Alain-Désiré Nimubona
 Peter Sahlas
 Claire Trottier
 Pierre-Hugues Verdier
 Sanni Yaya





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Financial Statements

Independent Auditor's Report

To the Directors of La Fondation Pierre Elliott Trudeau/The Pierre Elliott Trudeau Foundation

Our opinion

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of La Fondation Pierre Elliott Trudeau/The Pierre Elliott Trudeau Foundation (the Foundation) as at August 31, 2022 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, 2022;
- the statement of changes in net assets for the year then ended;
- the statement of revenues and expenses for the year then ended;
- the statement of cash flows for the year then ended; and
- the notes to the financial statements, which include significant accounting policies and other explanatory information.

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 7, 2022

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1. CPA auditor, public accountancy permit No. A116819

FINANCIAL STATEMENTS

Statement of Financial Position

As at August 31, 2022

	2022	2021
Assets	\$	\$
Current assets		
Cash and cash equivalents	1,625,593	1,565,330
Prepaid expenses and other receivables	842,760	536,893
	2,468,353	2,102,223
Investments at fair value (note 4)	141,594,918	165,734,893
Property and equipment (note 5)	220,741	327,653
Intangible assets (note 6)	33,957	89,436
	144,317,969	168,254,205
Liabilities		
Current liabilities		
Accounts payable and accrued liabilities	1,727,803	1,659,447
Current portion of scholarships payable (note 8(a))	1,109,253	1,131,302
Current portion of fellowships payable (note 8(b))	139,355	426,634
Current portion of mentorships payable (note 8(c))	221,766	381,885
	3,198,177	3,599,268
Deferred donations (note 7)	238,079	238,079
Scholarships payable (note 8(a))	1,224,400	1,576,269
Fellowships payable (note 8(b))	172,993	135,061
Mentorships payable (note 8(c))	462,780	502,306
	2,098,252	2,451,715
	5,296,429	6,050,983
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)	254,698	417,089
Internally restricted net assets (notes 3 and 10)	10,941,923	34,700,495
Unrestricted net assets (notes 3 and 11)	2,824,919	2,085,638
	139,021,540	162,203,222
	144,317,969	168,254,205



FINANCIAL STATEMENTS

Statement of Changes in Net Assets

For the year ended August 31, 2022

					2022	2021
	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	417,089	34,700,495	2,085,638	162,203,222	146,752,580
Cumulative reclassification of costs	-	-	(799,625)	799,625	-	-
Excess of revenues over expenses (expenses over revenues) for the year	-	(167,214)	(22,958,947)	(55,521)	(23,181,682)	15,450,642
Investment in property and equipment and intangible assets	-	4,823	-	(4,823)	-	-
Balance - End of year	125,000,000	254,698	10,941,923	2,824,919	139,021,540	162,203,222

FINANCIAL STATEMENTS

Statement of Revenues and Expenses

For the year ended August 31, 2022

	2022	2021
Revenues	\$	\$
Investment revenue	2,407,702	2,487,739
Net gain on disposal of investments at fair value	3,258,989	4,203,887
Net unrealized gain (loss) on investments at fair value	(24,085,083)	13,514,505
Donations (note 15)	632,592	441,308
	(17,785,800)	20,647,439
Expenses		
Public Interaction program (note 14(b))	1,624,688	721,604
Scholarship program	1,269,101	1,600,488
Fellowship and mentorship program (note 8(d))	(203,954)	414,756
Program planning and delivery (note 16)	1,553,388	1,626,582
Administration (note 16)	299,529	183,601
Investment and management (note 16)	542,780	471,602
Outreach, development and other (note 16)	310,350	178,164
	5,395,882	5,196,797
Excess of revenues over expenses (expenses over revenues) for the year	(23,181,682)	15,450,642



FINANCIAL STATEMENTS

Statement of Cash Flows

For the year ended August 31, 2022

	2022	2021
Cash flows from	\$	\$
Operating activities		
Excess of revenues over expenses (expenses over revenues) for the year	(23,181,682)	15,450,642
Items not affecting cash and cash equivalents		
Net gain on disposal of investments at fair value	(3,258,989)	(4,203,887)
Net unrealized loss (gain) on investments at fair value	24,085,083	(13,514,505)
Donations received in-kind	-	(49,309)
Accretion expense on scholarships, fellowships and mentorships payable (note 8)	23,230	14,989
Amortization of property and equipment	111,735	108,760
Amortization of intangible assets	55,479	56,178
	(2,165,144)	(2,137,132)
Changes in non-cash working capital components		
Increase in Prepaid expenses and other receivables	(305,867)	(280,015)
Increase (decrease) in:		
Accounts payable and accrued liabilities	68,356	32,373
Scholarships, fellowships and mentorships payable	(846,140)	(98,245)
	(1,083,651)	(345,887)
	(3,248,795)	(2,483,019)
Investing activities		
Purchase of investments at fair value	(14,170,498)	(12,157,275)
Proceeds on disposal of investments at fair value	17,484,379	15,013,938
Purchase of property and equipment	(4,823)	(35,638)
	3,309,058	2,821,025
Net change in cash and cash equivalents during the year	60,263	338,006
Cash and cash equivalents - Beginning of year	1,565,330	1,227,324
Cash and cash equivalents - End of year	1,625,593	1,565,330

Notes to Financial Statements

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 Corporations Act. The Foundation has been a registered charity under the Income Tax Act (Canada) 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.

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 recorded 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 initially recorded at fair value and subsequently at amortized cost using the effective interest rate method. For the Foundation, amortized cost is generally cost because of the assets' short term maturity.

Accounts payable and accrued liabilities and long-term liabilities are initially recorded at fair value and subsequently at amortized cost 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.



FINANCIAL STATEMENTS

Cash and cash equivalents

Cash and cash equivalents consist of deposits with a major financial institution and balances in the investment portfolios.

Revenue recognition

Donations

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

Gains and losses on disposal of investments at fair value

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

Scholarship, fellowship and mentorship programs

Scholarships, fellowships and mentorships are recorded as liabilities and expensed in the year of approval. Ongoing monitoring of the programs occurs on a continuing basis as part of an overall commitment to accountability. Since these programs are multi-year commitments, changes in amounts committed are adjusted in the year in which they occur.

Property and equipment

Property and equipment are stated at cost less amortization.

Amortization is provided for using the declining balance method over the estimated useful lives of the assets at the following rates:

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

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

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

Intangible assets

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

Impairment of long-lived assets

The Foundation reviews, when circumstances indicate it to be necessary, the carrying values of its long lived assets by comparing the carrying amount of the asset or group of assets to the expected future undiscounted cash flows to be generated by the asset or group of assets. An impairment loss is recognized when the carrying amount of an asset or group of assets held for use exceeds the sum of the undiscounted cash flows expected from its use and eventual disposition. The impairment loss is measured as the amount by which the asset's carrying amount exceeds its fair value based on quoted market prices, when available, or on the estimated current value of future cash flows.

3. Capital disclosures

As at August 31, 2022, 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 \$10,941,923 (2021 - \$34,700,495) (note 10), net assets invested in property and equipment and intangible assets of \$254,698 (2021 - \$417,089) (notes 5 and 6) and unrestricted net assets of \$2,824,919 (2021 - \$2,085,638) (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.

During the year ended August 31, 2022, the Foundation reviewed the allocation of costs among the classifications contemplated in the funding agreement to more precisely identify costs associated with investment and management of the fund in accordance with the funding agreement. This has resulted in a reallocation of certain historical costs the five-year period from August 31, 2016 to 2021, with no change in total expenses for each of those years ended August 31.

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 because pooled funds do not have maturity dates.



FINANCIAL STATEMENTS

	2022	2021
	\$	\$
Short-term investments pooled fund	3,567,060	3,600,142
Canadian bond pooled fund	46,109,898	53,030,389
Canadian equity pooled fund	8,387,331	9,485,822
Global equity pooled fund	70,868,284	86,388,799
Alternative assets fund	12,662,345	13,229,741
	141,594,918	165,734,893

5. Property and equipment

	2022	2021
	Net (\$)	Net (\$)
	Cost (\$)	Accumulated amortization (\$)
Office communication equipment	61,319	47,096
Furniture and fixtures	165,584	133,235
Computer equipment	174,648	141,427
Leasehold improvements	884,518	787,353
Artwork	43,783	-
	1,329,852	1,109,111

6. Intangible assets

	2022	2021
	Net (\$)	Net (\$)
	Cost (\$)	Accumulated amortization (\$)
Computer software	62,051	60,185
Software development costs	165,038	132,947
	227,089	193,132

7. Deferred donations

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

	2022	2021
	\$	\$
Balance - Beginning of year	238,079	238,079
Less: Amount recognized as revenue during the year	-	-
Balance - End of year	238,079	238,079
Partie à court terme des dons reportés	-	-
Partie à long terme des dons reportés	238,079	238,079
	238,079	238,079

8. Long-term liabilities

a) Scholarships payable	2022	2021
	\$	\$
Current portion of scholarships payable	1,109,253	1,131,302
Long-term portion of scholarships payable in years ending		
August 31, 2023	-	1,253,615
August 31, 2024	977,801	322,654
August 31, 2025	246,599	-
	1,224,400	1,576,269
	2,333,653	2,707,571

b) Fellowships payable	2022	2021
	\$	\$
Current portion of fellowships payable	139,355	426,634
Long-term portion of fellowships payable in years ending		
August 31, 2023	-	90,173
August 31, 2024	115,107	44,888
August 31, 2025	57,886	-
	172,993	135,061
	312,348	561,695

c) Mentorships payable	2022	2021
	\$	\$
Current portion of mentorships payable	221,766	381,885
Long-term portion of mentorships payable in years ending		
August 31, 2023	-	362,655
August 31, 2024	347,005	139,651
August 31, 2025	115,775	-
	462,780	502,306
	684,546	884,191

FINANCIAL STATEMENTS

d) Fellowship and mentorship program expenses

On March 11, 2020, the World Health Organization announced that the 2019 coronavirus disease (COVID19) could be classified as a pandemic. The activities of scholarship, fellowship and mentorship programs were impacted in particular because of public health measures to combat the spread of the virus, namely temporary confinements and travel restrictions.

As at August 31, 2022, management reviewed the estimates for its multi-year commitments by decreasing the amounts of fellowships and mentorships payable. As a result, fellowship and mentorship program expenses are composed of:

	2022	2021
	\$	\$
Fellowship and mentorship program expenses	245,038	507,814
Revaluation of estimated fellowship and mentorship payable	(448,992)	(93,058)
	(203,954)	414,756

e) Non-cash interest expenses

Non-cash interest expenses included in program expenses bearing interest at a rate of 1.48% (2021 - 0.72%), calculated using the effective interest rate method, are as follows:

	2022	2021
	\$	\$
Scholarship program	17,262	10,312
Fellowship program	2,198	2,198
Mentorship program	3,770	2,479
	23,230	14,989

9. Net assets restricted for endowment purposes

In March 2002, the Foundation entered into a funding agreement with the Government of Canada whereby the government granted an endowment of \$125,000,000 to the Foundation for the purpose of establishing the Advanced Research in Humanities and Human Sciences Fund.

In the event of a default by the Foundation, the Government of Canada may terminate the funding agreement and require the Foundation to repay funds not otherwise committed. According to the funding agreement, the endowment bears no interest and must be capitalized in perpetuity.

10. Internally restricted net assets

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

During the year ended August 31, 2022, the Foundation applied internally restricted net assets of \$22,958,947 against the excess of expenses over revenues not otherwise covered by the cumulative growth of the Fund (note 11). During the year ended August 31, 2021, the Foundation had capitalized \$15,498,925 to internally restricted net assets.

As at August 31, 2022, internally restricted net assets amounted to \$10,941,923 (2021 - \$34,700,495).

11. Unrestricted net assets

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

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

Since the year ended August 31, 2017, unrestricted net assets have been sourced exclusively from the private donation fund.

As at August 31, 2022, unrestricted net assets amounted to \$2,824,919 (2021 - \$2,085,638).

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 exposed to liquidity risk mainly through its accounts payable and accrued liabilities and scholarships, fellowships and mentorships payable. The Foundation's objective is to have sufficient financial liquidity to meet all financial obligations as they become due. The Foundation monitors its cash balances and cash flows, and offsets them against anticipated and committed outflows.

Credit risk

Credit risk is the risk that one party to a financial instrument will cause a financial loss for the other party by failing to discharge an obligation. The Foundation is potentially exposed to credit risk through its prepaid and other receivables and investments at fair value.

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, 2022, management does not believe the Foundation is exposed to significant credit risk.



FINANCIAL STATEMENTS

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 interest 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 and fellowship cohorts 2014 to 2016 for their unspent four-year allowances and to all 2020, 2021 and 2022 cohorts - scholarships, fellowships and mentorships - which, unlike previous cohorts, can no longer defer their unspent allowances (note 14):

Years ending	\$
August 31, 2023	2,293,927
August 31, 2024	860,000
August 31, 2025	410,000

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

Years ending	\$
August 31, 2023	213 000
August 31, 2024	18 000
August 31, 2025	-

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 no longer offered to scholar, fellow and mentor cohorts.

In 2022, the Foundation awarded 16 scholarships, 4 fellowships and 6 mentorships (2021 -15 scholarships, 4 fellowships and 6 mentorships). In both 2022 and 2021, one fellowship was as a result of a partnership with Fulbright Canada.

- 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 Institute of Engaged Leadership and the Spaces of Engaged Leadership program, that aim to provide opportunities to generate knowledge, learn and exchange ideas:

	2022	2021
	\$	\$
Research, travel and networking	921,685	403,272
Events and other activities	703,003	318,332
	1,624,688	721,604

15. Donations

	2022	2021
	\$	\$
Donation income for the year (note 7)	632,592	441,308

Donations made by directors, members, officers and related parties totalled \$149,958 for the year ended August 31, 2022 (2021 - \$188,756).



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16. Schedule of expenses

The statement of expenses shows the costs incurred to support Scholarships, Fellowships and Mentorships.

	Program planning and delivery		Administration		Outreach, development and other		Total	
	2022 \$	2021 \$	2022 \$	2021 \$	2022 \$	2021 \$	2022 \$	2021 \$
Salaries and benefits	749,739	1,153,219	147,543	143,951	124,592	102,294	1,021,874	1,399,464
Professional fees	406,094	53,045	77,049	21,222	67,990	2,450	551,133	76,717
Rent and occupancy costs	154,757	177,260	30,455	22,069	25,718	14,000	210,930	213,329
Office expenses	38,447	47,856	7,566	5,958	6,389	5,417	52,402	59,231
Amortization of property and equipment	76,650	81,244	15,084	10,115	12,738	6,417	104,472	97,776
Amortization of intangible assets	38,059	41,965	7,490	5,224	6,324	3,314	51,873	50,503
Bank charges	6,970	5,301	1,372	660	1,158	419	9,500	6,380
Meetings and travel	30,176	14,213	5,938	1,769	5,015	1,123	41,129	17,105
Outreach and communications	18,724	5,212	386	122	54,814	6,234	73,924	11,568
Recruitment costs	20,454	18,071	4,025	2,250	3,399	1,427	27,878	21,748
Other employee expenses	13,318	29,196	2,621	3,261	2,213	2,069	18,152	34,526
Administration expenses covered by private donation fund	-	-	-	(33,000)	-	33,000	-	-
	1,553,388	1,626,582	299,529	183,601	310,350	178,164	2,163,267	1,988,347

FINANCIAL STATEMENTS

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 and management costs of \$542,780 (2021 - \$471,602) 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 endowment fund and the statement of investment policies and procedures.

In 2018, the Foundation decided that expenses for the year in excess of the ceiling on operating costs imposed by the Foundation's funding agreement with the Government of Canada might be covered by the private donation fund at year-end. For the year ended August 31, 2022, nil of such expenses was drawn from the private donation fund (2021 - \$33,000).

17. Comparative figures

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



