



Final Report on the Implementation of the Change Commission Recommendations

January 24, 2011

SUMMARY

The Change Commission Report was finalized in April 2009 and included 47 recommendations, divided into 8 main categories. The report was posted on En Famille and copies were distributed to members at the 2009 Biennial Convention in Vancouver. It was also presented to the National Board of Directors¹ at its June 2009 meeting where Senior LPC staff were asked to review the recommendations for implementation. The Board agreed to prioritize the implementation of recommendations taking into account the LPC's strategic plan/budget and availability of staff resources. Those who had recommendations fall under their area of responsibility were designated as category leaders along with senior staff. A list of the category leaders and their email addresses is provided at the end of this report.

Category leaders reviewed the report and provided status updates on each recommendation to the Board of Directors at their September and December 2009 meetings, and their February and June 2010 meetings.

Please note the following:

Certain recommendations are designated as "completed" but we also indicate that they are "ongoing" since the goal is to continue to update these recommendations as new materials and/or resources become available.

Certain recommendations are designated as "partially completed" since their complete implementation depend upon the collaboration of third parties such as Caucus members and PTAs.

This final report on the status of all recommendations from the Change Commission Report will be emailed to all members and posted on En Famille and on the Extranet. Out of 47 recommendations in the report:

- 37 recommendations are completed
- 8 recommendations are partially completed
- 2 recommendations were not adopted or partially adopted

FINANCE

Recommendation 1: LPC should release an Annual Report, indicating where members' money is spent.

Status: Completed

¹ The term National Executive, which appears in the April 2009 Change Commission report, has been changed throughout this document to National Board of Directors which is the new title adopted at the Vancouver 2009 Biennial Convention.

An annual report will be drafted with the goal to provide a certain amount of information without giving too much to our opponents. Audited financial statements are submitted to and published by Elections Canada on its website (http://www.elections.ca/scripts/webpep/fin2/select_search_option.aspx). The audited financial statements for 2009 were emailed to the Council of Presidents and are available on the Elections Canada web site and on En Famille. The 2010 audited financial reports will be available in late summer 2011.

Recommendation 2: Donations, event summaries should be completed within 14 days of an event to allow timely receipting.

Status: Completed

Finance is using its best efforts to determine when events will occur and have occurred so that receipts can be issued. Finance is pro-actively working with organizers to ensure events are finalized in a timely manner – vendors paid and receipts issued. However, as costs must be determined before receipts are issued, a more realistic target is one month after the event.

Recommendation 3: LPC website should have the tools to more easily allocate funds according to donors' preferences.

Status: Completed

The new layout of the LPC donation web page (<https://action.liberal.ca/en/donate>) makes it easier for donors to give to the causes they want (i.e. Laurier Club, Victory Fund, Judy LaMarsh Fund). Furthermore, the IT team recently launched a complete event module that allows any Liberal to advertise and collect donations for any type of political event (<http://events.liberal.ca/Event-List.aspx?Lang=en>).

MEMBERSHIP AND OUTREACH

Recommendation 4: The party should organize a national day of community action involving all 308 ridings.

Status: Partially completed

Leading up to, and during the 2011 National Volunteer week (April 17-23), LPC will work closely with EDAs to ensure participation and assist EDAs with the event of their choosing. LPC suggests that EDAs choose a local charity to work with. Some volunteering ideas include: assisting seniors, greening spaces, park clean ups, and local food drives, to name a few. This practice should continue in subsequent years with the encouragement and support of LPC. More information will be sent to EDAs early in 2011 in order to prepare for National Volunteer Week.

Recommendation 5: EDAs should include participation in community activities as part of their Annual Report to LPC. LPC should include community activities as part of an EDA's Balanced Scorecard.

Status: Completed

See recommendation #19

Recommendation 6: We should set a minimum standard that riding associations, both held and unheld, have town hall/roundtable type meetings at least four times per year.

Status: Completed

See recommendation #19

Recommendation 7: EDAs should also hold small discussion group meetings, which should be reported on the EDA Balanced Scorecard.

Status: Completed

See recommendation #19

Additionally, the Membership Working Group, composed of 26 members representing every region in Canada, has developed a best practices guide for recruitment and member engagement processes (available on En Famille). LPC suggests that quarterly, at least one EDA executive meeting shall be preceded or followed by a small discussion group meeting, where all members are invited.

Recommendation 8: Every Critic could be responsible for developing at least one town hall/roundtable in a box, providing support with policies, possible speakers and literature.

Status: Partially completed

See recommendation #34 regarding Speaker's Bureau. LPC has extensive information on the extranet regarding policy announcements (talking points, sample news releases, etc.). We also have a number of branded supplies and a wealth of information for the Open Mike townhalls. The list of critics and their portfolios as well as information on existing townhalls in a box can be found on the extranet. In order to assist you in organizing these townhalls, please contact Chad Walsh at walshc@parl.gc.ca. Members are encouraged to register their events on <http://events.liberal.ca/SubmitEvent.aspx>.

ELECTION READINESS

Recommendation 9: Update and maintain Liberal University.

Status: Completed and Ongoing

All Liberal University modules have been updated and are available on the Extranet site, accessible to all riding presidents, candidates, Caucus, PTAs and Board of Directors. We will enlist the assistance of experts to contribute best practices to further update the modules and a Train-the-trainer presentation will be developed.

Through the weekly candidate calls with LPC staff, feedback is continually received on the modules and other candidate materials so that appropriate changes can be made.

Recommendation 10: Key stakeholders, including some past candidates, should directly be involved in policy and campaign development by way of a Shadow Caucus and as members of Virtual Advisory Committees for Critics.

Status: Completed and Ongoing

Policy development

An initiative was started by the members of the NPEP in June 2009 asking critics to review the resolutions related to their specific portfolios and communicating with a specific NPEP member to discuss. All liberal members including past candidates are involved in policy development by

having an opportunity to provide their feedback through the Canada at 150 Conference, the five regional meetings held in June 2010 and the Open Mike townhalls held in the Fall of 2010.

Campaign development

Ongoing discussions with the PTA election readiness co-chairs are being held to utilize the expertise of past candidates in the recruitment effort and in campaign management.

Recommendation 11: The 308 riding strategy must be implemented and embraced.

Status: Completed and Ongoing

See recommendations # 12, 14, 15, 21, 22, 25, 26, 30, 31, 32.

In order to help weak EDAs become properly functioning, LPC and OLO are paying more attention to “rural” issues. The Leader made a number of announcements on “Rural Canada Matters”, and policy development will now always go through a rural, remote, and northern filter. The Leader has also committed to spend more time in rural EDAs, and there are ongoing efforts to increase fundraising capacity and training for traditionally weaker EDAs. As well, in partnership with the Election Readiness team, the National Liberal Fund is assisting EDAs who need financial assistance.

Over the summer and fall of 2010, a series of weekly candidate calls were held with guest speakers (Caucus and other experts). A number of candidates in rural ridings have participated in these calls.

Recent research suggests that the national trend has the greatest impact on meeting the 10% threshold required to receive rebates from Elections Canada. 37 ridings did not meet the 10% target in 2008. Of these 37 ridings, only 10 missed the target in 2006 and of these 10, only 1 missed in 2004.

Recommendation 12: The party should develop a paid fieldworker system.

Status: Completed

LPCBC, LPCO and LPCQ have field worker programs and they are very successful. The National Board of Directors has approved funding in its 2010/2011 budget to hire additional field workers.

Recommendation 13: Conduct effective feedback forums for debriefing in the unheld ridings following elections campaigns.

Status: Completed

Following the last election, the Party President at that time held calls with campaign managers and riding presidents to gather their feedback. Many ridings hold debriefing sessions following an election. However, as PTAs are responsible for riding organization and readiness, a more formal process would have to be established between the National Office and the PTAs. The current National President has agreed to hold these calls following the next election.

Recommendation 14: Establish a twinning program for unheld ridings.

Status: Partially completed

Twinning has begun on a regional basis with caucus members as leads. Mark Holland, MP, was asked to spearhead this initiative.

Recommendation 15: Minimum standards for riding associations set immediately by the National Executive based on recommendations given by the Council of Presidents.

Status: Completed

See recommendation #19.

Recommendation 16: The party should maintain riding profiles.

Status: Partially completed

Riding organization and readiness is the responsibility of PTAs under the Party's Constitution. However, the LPC election readiness team has been surveying all ridings to determine their election readiness status and, in the process, has gathered important riding information. LPC will encourage PTAs to ensure that each riding has accurate and up-to-date riding profiles.

Recommendation 17: As part of the 308 riding strategy, the party should assist rural ridings by providing resources and support.

Status: Completed and Ongoing

See recommendations #11 and 12. Rural ridings are now able to participate in long distance training sessions provided through "webinars" and they can also access training videos via the extranet. The funding of additional field workers for PTAs will greatly enhance services to rural ridings.

Recommendation 44: The National Board of Directors should strike a Nominations and Appointments Task Force to review the procedures and to monitor these processes in the future. This Task Force could look at the determination of winnable and unwinnable ridings. It could also be involved in debriefs from unheld ridings, the determination of the viability of the losing candidates, and the mechanisms of incumbent protection.

Status: Partially completed

Under Section 60, the Party's Constitution places the responsibility for determining the rules relating to nominations and appointments with the National Election Readiness Committee, with no constitutional role defined for the National Board of Directors. In order to give this mandate to the National Board of Directors, a constitutional amendment would have to be presented at the next Biennial Convention.

Electoral District Associations (EDAs)

Change Commission Recommendations #18 to 21.

Please see Appendix A for the EDA Self-Evaluation Scorecard.

Recommendation 18: Each EDA must articulate its Riding's Mission Statement, in line with the National Constitution, and submit an annual plan to achieve that Mission. This will clarify expectations of the EDA and give the party a basis for accountability.

Status: Completed

Recommendation 19: The party should develop and implement an EDA Balanced Scorecard program.

Status: Completed

Recommendation 20: The party should establish an EDA recognition program.

Status: Partially completed

LPC Staff worked with the PTAs to recognize riding volunteers for awards at the Vancouver Biennial Convention. Recognizing that volunteers did not get enough visibility at the 2009 Biennial Convention due to a very tight schedule for the Opening Plenary, efforts will be made to allocate enough time for this award ceremony at future conventions.

The results of the EDA Scorecard and EDA planning processes will be incorporated to better establish the guidelines for recognizing EDAs for improving year over year.

Recommendation 21: Resources for EDAs.

Status: Completed and Ongoing

As mentioned under other recommendations dealing with EDAs, all materials/templates to assist EDAs and PTAs will be posted on the Extranet.

HUMAN RESOURCES

Recommendation 23: The party should develop the following resources for a comprehensive human resources strategy for the National and PTA offices, Campaign Managers, and EDA Boards

Status: Completed and Ongoing

LPC has a number of HR documents that it can share with PTAs and EDAs. Copies of these manuals and policies have been posted on the Extranet. Some of these policies are:

Competing for Public Support Responsibly
Working with Others
Donations and Fundraising
Whistle Blowers
Personal Conduct
Conduct in the Community
Proprietary Information
Unauthorized Use of Liberal Party of Canada Assets
Personal Gifts and Entertainment
Political Contributions
Compliance with the Law
Conflict of Interest
Computer Policy
Harassment Concerns Brought Forward
Expenditure Authorization Guidelines
Travel Policy
Personnel Policy
Declaration of Compliance

- Job descriptions;

LPC currently has numerous job descriptions on hand and through the annual review process is gathering and updating the job descriptions. Job descriptions at the PTA and EDA levels would differ from the national office but assistance is available to develop job descriptions. We will also post some job descriptions on the Extranet.

- A recruitment process;
LPC has a recruitment process documented which it utilizes for all hirings.
- Retention strategies;
With the nature of turnover at the Party, a retention strategy is difficult to develop and implement. However, the National Board of Directors recognizes the importance of retaining employees and the corporate memory. When new positions become available, internal staff are given priority to fill those positions.
- Succession planning;
Due to leadership changes, succession planning is quite difficult. The National Board of Directors will need to address this issue.
- A performance management plan;
LPC currently has a performance review process in place.
- A reward and recognition program;
LPC has a long-term service awards program as well as a quarterly staff nominated recognition awards.

Compensation and market survey guidelines:

- Environmental scan and categorize roles;
LPC does an environmental scan and categorizes roles during the preparation of the annual budget and during performance evaluation time. Training is also identified during performance evaluations and we attempt to anticipate training needs during annual budget preparation time.

Market survey guidelines;

- Develop monthly webinars
LPC conducts periodic training sessions for new and existing staff. Webinars are regularly conducted with candidates.

Recommendation 43: Party staff should report annually to the National Executive, the Leader and the Caucus on progress in equitable representation.

Status: Completed

Best Practices are currently being researched in the area of reporting on equitable representation and data will be gathered and reported on for the 2010 year in early 2011.

The National President is also mandated by the LPC constitution to report at every biennial meeting on the status of the representation of Aboriginal peoples and women in the party structure. A strategy to increase representation of these groups will be included as part of the President's report.

FUNDRAISING

Recommendation 22: The party should establish a National Volunteer Bureau.

Status: Completed

LPC now has a staff assuming the position of volunteer coordinator. Also, as stated in recommendation 25 below, Liberalist contains all volunteer data including areas of expertise which is accessible to all ridings and candidates. Any inquiries should be directed to Robert Jamieson at rjamieson@liberal.ca

Recommendation 24: A concerted effort must be made to increase our contact information for members and supporters.

Status: Completed and Ongoing

All donation forms request email and phone data. OLO and LPC are considering licensing a product that will allow for phone number appending. Telemarketing vendors are asking all donors/members without an email address to provide one. As well, all LPC event coordinators are encouraged to provide contact cards for all event participants. The Open Mike townhalls held in the Fall have been very successful in gathering contact information from members and other participants.

Recommendation 25: A volunteer database should be established in a web-based format.

Status: Completed

See recommendations #22, 30, 31 and 32.

A volunteer database is now maintained in Liberalist. All riding presidents, MPs, candidates, have access. Data is also captured via the online membership application form and sent directly to the member's riding. To date, thousands of users have been trained on Liberalist.

COMMUNICATIONS

Recommendation 26: This review should examine not only practices at the centre, but also consider what has to be done to improve the quality of websites at the PTA and EDA levels.

Status: Completed

Since December 2008, we've experienced a revolution in communications practices at the "centre". In addition to a more coordinated approach between OLO / LPC on media relations and strategic communications, we've developed a more focused approach to e-solicitations and internal communications. This review of practices was done not only as a result of our new colleagues at OLO, but also as a result of the huge investments in technological capacity.

Because the changes at the "centre" have been resource intensive, more work remains to be done at the PTA and EDA level. Having said that, our colleagues in IT have designed and implemented microsities which will be used by every candidate and riding association and which have the potential to be applied to PTAs. These microsities have been designed with integration in mind, make better use of social media and are fully tied to the Liberalist database.

Given the closer integration of the Ottawa communications team and the vastly improved technological infrastructure, we are proud of the fact that, as a recent Globe and Mail editorial pointed out: "The Liberals' communications have been professionalized." That being said, more work remains to be done to translate these successes at the national level to the ground, but this effort is being made with a keen interest in improving two-way communication with Caucus, PTAs and EDAs.

Recommendation 27: En Famille and Elluminate should be enhanced and used for a wider range of interactive communications within the party.

Status: Partially adopted

OLO IT staff recently developed a new online software platform to discuss the policy resolutions which was approved by the National Policy and Platform Committee. This will assist in planning for the workshops and think tank sessions for the 2011 Biennial Convention. The new program will also integrate well with the existing LPC virtual townhall software and the web cast during the convention. EnFamille continues to be managed by volunteers for LPC members as a means of interactive communications.

Elluminate poses significant challenges related to minimum equipment requirements (i.e. – webcams, microphones, and high speed internet). However, we have made much use of Go to Webinar, which allows people to follow a PowerPoint presentation, while joining a simultaneous conference call using our own call codes. We have also provided a number of opportunities for members to participate in virtual town hall discussions with the Leader and Caucus members.

Recommendation 28: EDAs must ensure party offices have up to date contact information for Executive officers so that communication channels relating to core party functions can operate. Party offices must respond to communications from members and EDAs in a timely fashion.

Status: Completed

A complete list of contact information is kept current on Liberalist and searches can also be done on LPC's Extranet site. This information is gathered through a combination of sources such as PTAs, regional desks and EDAs.

Recommendation 29: The party must continue to develop its capacity to deliver informed and useful party news, policy materials and political analysis to its members through its means of communication.

Status: Completed

Through a more focused approach to e-solicitation and internal communication (described in more detail in response to recommendation 26), LPC has been able to streamline its communication to members. Whereas the proactive dissemination of information must be tightly controlled to remain efficient, a "Party" section has been added to the www.liberal.ca website to act as a portal for supporters, members and officials.

In addition, the increased use of web tools, more frequent Council of Presidents conference calls and the permanent membership card package allow for more direct contact with our members and officials.

Recommendation 30: LPC should offer a website template, training, content and hosting to EDAs.

Status: Completed

As mentioned previously, microsites have been developed for this purpose and are currently available to EDAs and nominated candidates. The LPC helpdesk number is 1-866-574-5131 or by email at assistance@liberal.ca

Recommendation 31: LPC should develop a new member welcome package.

Status: Completed

Communications

The new national membership rules and the centrally distributed permanent membership card have facilitated the distribution of such a package. Since the introduction of the cards, all members now receive a welcome letter from the Membership Secretary and the Leader, as well as information on donation programs like the Victory Fund.

Membership

Members now receive an e-mail within their first two weeks of membership welcoming them, providing EDA contact information, membership number and other useful information.

Recommendation 32: LPC should develop an e-newsletter template for the EDAs.

Status: Completed

A newsletter template and email blast tool is integrated with Liberalist. EDAs can sign up to the program for a minimal cost. Further information can be provided by Azam Ishmael at aishmael@liberal.ca

Recommendation 33: LPC should make more use of social networking sites.

Status: Completed

In coordination with the OLO, we have dramatically increased our use of social networking and news media. The Leader sends frequent Tweets and Facebook updates to a growing list of followers. These social networking sites alone reach tens of thousands of supporters many times daily. The Leader's tour is also increasingly making use of Flickr for photos and a blog feature on www.liberal.ca. In addition, the newly updated website and microsites are designed to make full use of social networking sites.

LPC is also making good use of these tools. We are in constant dialogue with bloggers and have made innovative use of Twitter for releasing fundraising results. During the Canada at 150 event in Montreal at the end of March 2010, we were the #1 Twitter site all weekend.

Recommendation 34: LPC should maintain a Speaker's Bureau.

Status: Completed

See recommendation # 8 regarding townhall-in-a-box package for ridings.

Much time and resources have been invested in developing a coordinated auxiliary Caucus tour. Led primarily by Political Operations, this initiative ensures the coordination of requests for Caucus members by riding associations in every region of the country. A list outlining MPs as possible speakers with their areas of expertise will be listed on the extranet. All requests for speakers should be sent directly to Chad Walsh at walshc@parl.gc.ca

Recommendation 35: LPC must ensure highest quality French in all translated communications.

Status: Completed

In recognition of the need for greater consistency and quality control with respect to translation, the OLO and LPC have centralized their translation services. This new protocol has been in place since May 2009, and has resulted in an appreciable improvement of the consistency and quality of our translated documents, particularly in the French language.

POLICY DEVELOPMENT

Recommendation 36: A review of the policy process should be undertaken by the National Policy and Platform Committee, reporting to the National Board of Directors.

Status: Completed

The National Policy and Platform Committee (NPEP) has reviewed the policy process for the 2011 Biennial Convention. The NPEP has also established a sub-committee looking at post 2011 policy processes. In addition to this report being posted on the Extranet in February 2011, it will also be presented at the June 2011 convention where delegates will have an opportunity to debate the recommendations presented. Also, all policy announcements are listed on the Extranet.

Recommendation 37: Every effort must be made to maximize the number of party resolutions in the election platform.

Status: Completed

With the establishment of the position of Caucus Accountability Officer, a report is presented at each biennial convention outlining the action taken for policy resolutions adopted at the previous biennial convention. The National Policy Chair and the Caucus Accountability Officer are both members of the Platform Development Group and the NPEP and can ensure that policy resolutions submitted and voted on by the party grassroots are considered for the Platform.

Recommendation 38: Party policies should be posted on EnFamille.

Status: Completed

Policies are posted on the LPC website.

Recommendation 39: Caucus critics should maintain two-way communications with Party members on policy issues between elections.

Status: Completed

The Leader and Caucus critics hosted a number of virtual town hall meetings with members. An online forum was held with the Leader and Caucus critics following the National Policy Discussion meetings held in June 2010. The critics will also host online discussions on the new policy discussion site where members will have an opportunity to provide feedback on policy issues which will then be reviewed by the NPEP. This feedback will form part of their report to the Platform Development Group. Also, during the Montreal Conference, a significant number of MPs hosted events in their ridings to discuss the five themes presented at the Canada at 150 Conference. As of September 2010, regularly-scheduled discussion forums will be planned with Caucus critics and members.

GOVERNANCE

Recommendation 40: LPC should provide board training for members of the National Board of Directors.

Status: Completed

A Board orientation manual has been prepared for new Board members including all LPC policies, contact information, organization charts, minutes of past meetings and relevant reports. Following each biennial convention, training sessions will be provided to the new LPC Table Officers. The orientation manual will be provided to PTA and EDA boards as a template and can be accessed through the Extranet.

Recommendation 41: The National Board of Directors should be responsible for hiring and firing the National Director.

Status: Completed

Since January 2010, the National Board of Directors has developed a new process for the hiring and firing of the National Director. For the hiring of the new National Director early in 2010, a selection committee was established composed of LPC Board members and one of the constitutional advisors. They reviewed all applications, interviewed applicants and made a recommendation to the full Board of Directors. Once the Board of Directors made its selection, the Leader's approval was sought prior to presenting an official offer of employment to the prospective candidate.

Recommendation 42: Electronic voting should be considered for future Leadership votes.

Status: Completed and Ongoing

The LPC constitution now specifies that future Leaders will be elected by OMOV, therefore a number of voting methods can now be considered. An Ad Hoc committee was established in June 2010 by the National Board of Directors to develop the rules and procedures for OMOV. It is anticipated that the Committee will report back to the Board of Directors in the Winter of 2011.

Recommendation 45: The National Board of Directors should establish complaints and discipline procedure, with an Ombudsperson or Discipline Committee investigating complaints and reporting to the Board.

Status: Partially completed

See recommendation #46

Recommendation 46: The Board of Directors should establish a code of conduct and schedule of sanctions for inappropriate conduct by members.

Status: Partially completed

The Board of Directors approved a Code of Conduct at its December 2009 meeting and referred the issue of sanctions for inappropriate conduct to the National Membership Secretary. The code of conduct is available on En Famille.

A constitutional amendment will be presented at the next biennial convention in June 2011.

CHANGE COMMISSION

Recommendation 47: The Change Commission should continue working to oversee and ensure the implementation of the Deliverables, with a youth member and a former or current member of the paid staff joining the current members of the Commission to ensure geographic balance in the makeup of the Commission.

Status: Not adopted

The mandate of the Change Commission ended with the submission of their report in April 2009. The LPC Board of Directors has taken responsibility to prioritize and implement the recommendations.

APPENDIX A
EDA Self-Evaluation of Annual Plan

The checklist/evaluation criteria should be used for each EDA to prepare its action plan for the year and then evaluate itself. This auto-evaluation would then be presented to the members at the AGM. A copy would be given to the area director who would in turn give a summary (including best practices gathered from all of the EDAs) of the evaluations of the EDAs in his or her area (once the summary has been shared with each EDA to see if the area director has captured the essence of the self-evaluation) to the regional president.

The role of the area director would be to attend the EDA's AGM and explain to the members and the new Executive the objectives of the evaluation. He or she should also be available to support and help, if necessary, with the action plan and the evaluation. For this to work, the role and the mandate of the area director needs to be clarified/modified. `Remediation` or helping with the areas that require support has to be explicit in his/her mandate.

Name of EDA: _____ Year: _____

D = Done PD = Partially Done ND = Not Done Need Help = NH

Activity	D	PD	ND	NH
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Organisation

Proposed and adopted Annual Plan				
EDA Executive meetings: Target # of meetings _____ & Results _____				
AGM				
Up-to-date riding constitution filed with PTA				
Current executive list filed with PTA (including e-mail addresses)				

Finances

Establish budget for EDA's activities				
Annual Statement of Registry Information sent to Elections Canada by May 31, cc PTA				
Registered Association Financial Transaction Return sent to Elections Canada by May 31				
Tax receipting information for donations/events sent to LPC/PTA on a monthly basis but not later than mid-January				
Financial status quarterly, bank statement available to PTA				
Estimated total debt level (if applicable) available to PTA				

Communications with Members

Communications Chair				
Newsletters: Target # of issues _____ & Results _____				
Website				
- Updated regularly				
- Association articles/letters to the editor				
Facebook				

D = Done PD = Partially Done ND = Not Done Need Help = NH

Policy

Policy Chair/Vice-President				
Committee				
Preparation of resolution(s)				
Town halls/Roundtables: Target # _____ & Results _____				

Participation in LPC/PTA and Regional Activities

Attendance at training sessions: Target # participants _____ & Results _____				
Riding president or designate at 3 Executive Boards/AGM: Results _____				
Riding representative at PTA Policy Meeting				
Attendance at Regional meeting: Target # participants _____ & Results _____				
Attend CoP Annual Meeting				
Delegates at biennial Target # participants _____ & Results _____				

Community Outreach

Outreach Chair:				
Letters to the editor: Target # _____ & Results _____				
Planned events: Target # _____ & Results _____				
Participation in community events: Target # _____ & Results _____				
Identification of community leaders				
Meetings with community leaders: Target # _____ & Results: _____				

Membership

Membership Chair/Secretary				
Committee				
Target # of new members _____ Results _____				
Blitzes/campaigns: Target # _____ Results _____				

Social Events

Social Committee Chair				
Planned events: Target # _____ & Results _____				
Volunteer Recognition event planned				

Liberalist

Number of Executive members with access _____				
Up-to-date – maintenance of database				
Number of volunteers trained _____				

Fundraising

Fundraising Chair				
Victory Fund members: Target # _____ & Results _____				
Laurier Club members: Target # _____ & Results _____				
Amount to raise: Target amount \$ _____ & Results _____				
Activities & Events:				

D = Done PD = Partially Done ND = Not Done Need Help = NH

Election Readiness

Election Readiness Chair				
Statistics from previous elections				
List of community organizations				
Budget set – dollars needed and plan to raise funds in place				
Candidate search: how many identified? Interviewed?				

*This list is not exhaustive. Add whatever else your EDA does.

What we do well (as evidenced by year over year results):

Where we think we need assistance:

What specific skills/talents can we offer to assist other EDAs:

Lead and contact information for recommendations

Lead on Change Commission for the National Board of Directors:

Brigitte Garceau – National Vice President (French) – brigittegarceau@sympatico.ca

Monique Trottier – Director, Executive Secretariat – mtrottier@liberal.ca

Membership and Outreach:

Robert Jamieson – Senior Director, Membership and Victory Fund, rjamieson@liberal.ca

Finance:

John Duffy, Chief Financial Officer, johnduffyca@gmail.com

Mary Jessop – Director of Finance, mjessop@liberal.ca

Policy Development:

Joan Bourassa – National Policy Chair, jbouassa@liberal.ca

Monique Trottier – Director, Executive Secretariat – mtrottier@liberal.ca

Election Readiness:

Sen. David Smith – National Campaign Co-chair, smithd@parl.gc.ca

Richard Maksymetz – Director of Election Readiness, rmaksymetz@liberal.ca

Electoral District Associations:

Stephen Kukucha – National Vice President (English), skukucha@liberal.ca

Monique Trottier – Director, Executive Secretariat, mtrottier@liberal.ca

Human Resources:

John Arnold – Senior Director, Administration and Compliance, jarnold@liberal.ca

Fundraising:

Herb Metcalfe – National Revenue Chair, hmetcalf@capitalhill.ca

Adam Smith – National Director, National Liberal Fund, asmith@liberal.ca

Communications:

Sarah Bain - Director of Communications – sbain@liberal.ca

Governance:

John Duffy, Chief Financial Officer, johnduffyca@gmail.com

Monique Trottier – Director of Executive Secretariat, mtrottier@liberal.ca