



*Change Commission  
Commission du changement*

**ADVANCING CHANGE TOGETHER**

A Time to **ACT**

**The Report of the Change Commission  
of the Liberal Party of Canada**

**April 2009**

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**“It is not the strongest of the species that survives, not the most intelligent but the one most responsive to change.”**

## Foreword

As the co-chairs of the Change Commission, we admit that we began this process with a declared bias and a clear understanding that the ‘status quo’ was not good enough. There may have been some members of our party who thought that as the ‘national governing party’ we could just carry on as ‘we’ve always done it’. They thought we could just wait for the people of Canada to decide that Stephen Harper was bad for Canada and would return the Liberal Party of Canada to government soon enough. We were not of that view.

Einstein defined insanity as, “doing the same thing over and over again and expecting different results.” We are big believers in Charles Darwin’s observation: “It is not the strongest of the species that survives, not the most intelligent but the one most responsive to change.”

Three leadership races in five years and three disappointing elections have taken a toll. If we are to win back the respect of former Liberal Party members and supporters, and of enough Canadians to form a government, we are going to have to improve our performance. We believe that the Liberal Party has remained one of the strongest brands in Canada because it has steadfastly represented the core Canadian values of fairness and respect and has been always able to ‘s’adapter’ to changing needs and the evolving understanding of what is fair. It is time for change.

The recent success of the U.S. Democratic Party did not happen overnight. After their terrible showing in the 2002 mid-term elections they made a conscious decision to effect a radical shift in their approach. Governor Dean enhanced the process with his presidential candidacy in 2004 and the innovative two-way accountability of his online campaign. He then continued his commitment to ‘bottom up’ renewal as Chair of the Democratic National Committee. At the Liberal convention in 2006, he described the ‘50 State Solution’ – his theory that focusing on the democratic ‘blue shoulders’ of New England, Washington, Oregon and California would never bring them a moral authority to govern America. Since then, Barack Obama combined an inspirational message of hope with an authentic community development model to actively turn every Democratic Party supporter into a worker, a policy resource, and a donor. The result: a genuine motivation to go out and vote! After six long years of genuine renewal, the Democratic Party won over the hearts and minds of the American people and won the Presidency and a majority in both houses.

In November, the National Executive of our party voted to strike the Change Commission as a parallel process and antidote to yet another potentially competitive and divisive leadership race. It was clear that our party needed to get to work rebuilding itself outside of the leadership camps. As we did our work it became clear that what began as a process to re-engage the grassroots of the party has now evolved into a very serious conversation about performance and human capital. The grassroots of our party is now focused on transforming our organization into a truly professional body that is accountable to its members for its actions and results. Change has already begun.

Professor Ursula Franklin has said that good governance is ‘fair, transparent and takes people seriously’. She has said that if political parties don’t themselves demonstrate good governance in the conduct of their smallest committees they should not expect that citizens would trust that they would govern that way. We must once again demonstrate to Liberal members that they are

**“ Good public policy comes when the policy makers can see in their mind’s eye the people affected.”**

valued. Less than 5% of Canadians belong to a political party. We must start at home by demonstrating to the engaged citizens who have chosen to belong to the Liberal Party of Canada that we believe their contributions are essential to the ultimate goal of achieving a fair and inclusive Canada that is able to assume a leadership role in the world.

The Liberal Party of Canada needs to be a welcome home for all the progressive voices and thinkers in the country. It needs to ‘walk the talk’ of ‘democracy between elections.’ We must do an even better job of distinguishing ourselves from the old-fashioned, top-down paternalism of Stephen Harper and the Conservatives. We must show that we have both the capacity and the genuine, effective mechanisms to listen to the real problems facing Canadians in these challenging times, and that we are prepared to harvest solutions from the knowledgeable people on the ground.

Jane Jacobs said that: “Good public policy comes when the policy makers can see in their mind’s eye the people affected.”

From rural Canadians, to youth, to women, to indigenous peoples, to foreign-trained graduates, to persons with disabilities, to people who have paid all their life into EI and now don’t qualify, we must show that we will listen to their stories and work with them to put in place the policies that will be good for them and their families for generations to come.

We believe, as you do, that the Liberal Party of Canada needs to rebuild from the ‘bottom up.’ It is clear that we must ensure the culture of the Liberal Party of Canada is not ‘top down’ but has a genuine respect for the values, ideas, and the contributions of time and energy of its members and supporters in the trenches. Liberal Party members and candidates in all 308 ridings in this country must feel that they are valued and can play a role in winning back the Canadian people’s confidence of in our party. But it is also clear that culture change has to be more than reassuring rhetoric. As Commissioners, we hope you will see in our report the concrete ‘deliverables’ and timelines that will embed the necessary changes into the DNA of our organization.

We believe that our recommendations will go a long way to putting in place the structure, processes and accountability frameworks necessary to achieve a modern, successful party that is fair, transparent and takes the grassroots of the party seriously. But we know that this is just the beginning.

As the Change Commissioners, we are counting on everyone committed to the renewal of our party to work with us long after the Vancouver convention to ensure that the recommendations of this report will be considered, improved upon, and realized in real changes. This project will take time and constant vigilance.

We thank our leader, Michael Ignatieff, and all of you who have contributed to this process. Your interventions have shown us that you agree that the Liberal Party of Canada must improve the way we do business. As our Whip, Rodger Cuzner says, “We must raise our game.” We owe it to the people of Canada.

The Change Commission’s consultation process and report completion was the collective work of a great number of people. In thanking particular contributors, we accept the inevitable risk of leaving out some of the wonderful people who helped in order to express our sincere appreciation, admiration and affection for a very special group of ‘reformers’ who contributed their energy and time and talent: Stéphane Dion, whose encouragement of the Change initiative

was invaluable; William Watson and Lynne Steele have been absolute stalwarts from the original idea to the submission of the report; Tim Plumptre provided expertise on governance, ensuring a meaningful process and report; Ron Hartling and his team, especially Jean Louis Tanguay and Doug Bridges, provided the essential tools and support via *En Famille*; James Anderson and Latitia Scar gave us valuable support from the National Office; Caucus members Navdeep Bains, Ken Dryden, Mark Holland, Dominic LeBlanc, Keith Martin, Rob Oliphant, Glen Pearson, Michelle Simson and Justin Trudeau provided leadership and demonstrated their willingness to ‘be the change we want to see’ by making themselves available for the online Townhalls; Joan Bourassa and Maryanne Kampouris also helped with the policy online Townhall; a very special thank you to Adrian Ludwin and Scott Maxwell who did an enormous amount of work with the *En Famille* content engaging and summarizing; thank you also to Ron Collis, Sally McGrath, Eileen Shuchat and Greg Wilson, all wonderful volunteers who pitched in to make our regional meetings a huge success; other members, such as Heather Carter, Matt Daudlin, Sandra Gardiner, Dr Sean Godfrey, Betsy McGregor, Judith Moses and Matthew Stickney, provided much needed context, observations and inspirational ideas as we did our work.

Thank you, merci, meegwitch.



Doug, Carolyn and Brigitte.

**“The Liberal Party of Canada is dedicated to the principles that have historically sustained the party: individual freedom, responsibility and human dignity in the framework of a just society, and political freedom in the framework of meaningful participation by all persons. The Liberal Party is bound by the constitution of Canada and the *Canadian Charter of Rights and Freedoms* and is committed to the pursuit of equality of opportunity for all persons, to the enhancement of our unique and diverse cultural community, to the recognition that English and French are official languages of Canada, and to the preservation of the Canadian identity in a global society.”**

## Mandate

The National Executive of the Liberal Party of Canada established the Change Commission in the fall of 2008, with co-chairs Carolyn Bennett, Doug Ferguson and Brigitte Garceau. This recognition of the need for change within our party follows three elections where more Liberal supporters could have participated in campaigns and on election day, and three leadership races that hurt our party unity. We can only form government by winning back the respect of former Liberal Party members, supporters, and enough progressive Canadians – and this requires us to improve our performance.

Our mandate was to seek the opinions of party members on a wide range of questions. The topics included finances, community engagement, rebuilding riding associations, making better use of technology, improving the party structure and internal communications, strengthening the policy process, and outreach. Our overall goal has been to inquire into what is needed to renew and revitalize the Liberal Party.

In this report, we identify the concerns of the party members who contributed to our discussions and make recommendations for addressing these concerns, many of which were suggested by the contributors. We were not able to provide specific recommendations to address every concern that was raised; some of these issues demand more sustained reflection within the party. We identify where this is the case, and recommend further deliberation.

## The Liberal Party of Canada: Values and Mission

The Liberal Party is a huge organization dedicated to the political goal of forming the federal government, and committed to providing a just, generous, effective and sustainable government for the people of Canada. We are bound together by the core beliefs, traditions and values that define what it is to be a Liberal, and guide us all; the individual members, some of whom are very active volunteers; the Electoral District Associations (EDAs); the Provincial and Territorial Associations (PTAs) and their associated staff; the Caucus; the National Leader; the National Office; and the National Executive. The operation of this complex structure is guided by the Constitution of the party, and a host of other established practices and policies covering finance, data management, communications, policy development and other crucial functions. Each of these should reflect the values which ultimately motivate us as Liberals.

Any revitalization of the party structure must embody our Liberal principles. The party's principles are found in party documents, some of which have official status, while others are complementary texts developed by various committees and individuals associated with the party. The core definition appears in the Preamble to our Constitution, which confirms our commitment to democratic governance and the rule of law, and declares:

The Liberal Party of Canada is dedicated to the principles that have historically sustained the party: individual freedom, responsibility and human dignity in the framework of a just society, and political freedom in the framework of meaningful participation by all persons. The Liberal Party is bound by the constitution of Canada and the *Canadian Charter of Rights and Freedoms* and is committed to the pursuit of equality of opportunity for all persons, to the enhancement of

**“I would be proud to be a member of a Liberal Party that was inclusive, cooperative, innovative and consultative of its members, the citizens of Canada, other parties and the world. A party that maintained talent and depth for its pool of potential MPs, advisors and supporters... A Liberal Party that thinks globally and acts locally, envisions the big picture and facilitates the details.”**

our unique and diverse cultural community, to the recognition that English and French are official languages of Canada, and to the preservation of the Canadian identity in a global society.

The participants in our consultations across Canada made frequent reference to these core values, calling for the party to champion and embody transparency, openness, inclusiveness, high ethical standards, engagement in communities, social responsibility and fairness, a focus on human rights, fiscal responsibility, international orientation, listening to the grassroots, and treating people – members of the party and members of the public – with dignity and respect.

As one contributor, Edwin Stephens from London-Fanshawe, put it: “I would be proud to be a member of a Liberal Party that was inclusive, cooperative, innovative and consultative of its members, the citizens of Canada, other parties and the world. A party that maintained talent and depth for its pool of potential MPs, advisors and supporters... A Liberal Party that thinks globally and acts locally, envisions the big picture and facilitates the details.”

The Change Commission’s work is, then, to explore ways in which these deeply held liberal convictions can infuse the operations of our party – ways in which we can become true to Professor Ursula Franklin’s insight that good governance is “fair, transparent and takes people seriously,” so that our members, supporters, activists, staff and parliamentarians experience the realization of Liberal values in their engagement with the party, and become an energetic force for change in Canada, its provinces and territories, and its thousands of communities.

One of our participants, Adrian Ludwin from Beaches East-York, one of our newest and most active party members who joined last fall in reaction to the election result, captured much of this when he wrote: “I would be proud to be a member of a Liberal Party that provided all its members meaningful ways to participate, openly and honestly discussed matters of policy and, if in government, implemented what we developed together, planned for the future and not just for the next four years.”

This vision does not work at odds with the desire expressed to us by Liberals across the country that our party also must show greater direction and unity, and that it perform more effectively between and during elections, and in government and opposition. Indeed, the increased professionalism we are all demanding of our party goes hand in hand with its development as a more open, responsive and accountable organization. The work of the Change Commission is a key element in the urgent modernization of our party.

## What we did

The Commission consulted with Liberals across Canada through a variety of means. We opened up online discussions in *En Famille* in which a total of 2,056 responses were received from party members. We created discussion threads around nine questions, all reflective of the five-point framework for reform, and invited members of caucus to draft discussion documents on each theme. They were posted on the website and further comments related to those documents were invited. The questions, and the caucus participants, were as follows:

**Why don’t Liberals donate to the party as much as other political parties? How can we convince party members to donate to their riding and/or the national party? — Ken Dryden MP**

How can we engage party members in the community? How can we attract community leaders to join the party? — **Glen Pearson MP**

How can we best reach out to community groups and multicultural organizations? — **Mark Holland MP**

How can we best rebuild weak riding associations? — **Michelle Simson MP**

How can LPC and the provincial and territorial associations better serve riding associations? — **Rob Oliphant MP**

How can we improve the party's use of technology? How can technology best serve our ridings and our members? — **Keith Martin MP**

How can LPC improve the party's internal communications? What do members want to hear from the party? — **Justin Trudeau MP**

How can LPC improve the policy resolution and policy discussion process? — **Dominic LeBlanc MP**

How can we improve the structure of the party nationally, provincially, and locally? — **Navdeep Bains MP**

We added a tenth 'open stream' for contributions which did not fit into any of the above categories. We also organized regional meetings across Canada during the month of March, each of which was attended by members of the Commission and most also by the National Leader. These consultations took place in Edmonton, Halifax, Laval, Toronto, Vancouver and Winnipeg. In some settings, party members from other locations in the region linked in via *Illuminate* software and participated online. The usual format was to have a short presentation by Commission members, discussion among party members at smaller tables, followed by feedback to the plenary and general discussion. We asked the participants to complete three statements:

I would be proud to be part of a Liberal Party that...

The most critical challenges facing the Liberal Party are...

In order to be successful, the Change Commission must...

These were vigorous and informative meetings, and through them dozens of party members were able to share their impressions and concerns. In addition, we organized a series of online "virtual town hall" meetings. The authors of the caucus discussion documents and members of the commission made themselves available on Monday evenings on *En Famille* to engage in live discussions with party members.

Finally, within the constraints of available time, we commissioned a series of one-on-one interviews with some senior leaders in the party to seek their confidential views related to our mandate. The following report draws extensively the contributions of party members secured through these activities, and we wish to express our warm thanks to all those who took part for their interest and support. Likewise, we thank the caucus members who drafted discussion documents and took part in the online town halls and conversations.

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**Treat a prospective donor like a person... How would I like to be treated? What makes me want to get involved, give time, give money? I want to feel like I belong. I want to feel like I matter. I don't want to feel like a 'donor,' a thing... I want to be treated like a person. If you do that, I'll be there. If you don't, I'm gone.**”

## What we learned

We learned during our consultations that there is great pride in the past accomplishments of our party, in previous Prime Ministers such as Pearson and Trudeau, and in our contribution to Canada through Medicare, the social service safety net, the reduction of the deficit, the patriation of the constitution, and the adoption of the Charter of Rights and Freedoms. Party members value the Liberal “brand” and identify with it. Many think of the party as a movement. The Red Ribbon Task Force report, and the Axworthy Renewal policy documents developed in 2006, were also seen as important accomplishments in the more recent past. There were also fond memories of the Aylmer and Kingston conferences, which were seen as seminal events in reaffirming Liberal values and defining Liberal policy.

However, there was no doubt that the party members we met want to see many improvements in the way the party operates, and they believe that these changes are necessary for Liberals to feel a renewed pride and confidence in the party. These concerns are not new – they have been developing over several years and indeed have been the subject of a number of reports, including the 2006 Red Ribbon and the Kingston and the Islands Party Reform reports.

Here is a brief summary of the responses to the nine questions posted on *En Famille*. The summary is based on contributions we received through all the means of consultation we employed. We believe that the contributions of our participants in answering our questions point the way forward to a renewed spirit and energy in our party.

### FINANCES

**Why don't Liberals donate to the party as much as other political parties? How can we convince party members to donate to their riding and/or the national party?**

Certainly one of the most serious concerns is the financial situation of the party. Participants regret the party's slow adaptation to the requirements of C-24. They perceive the need for basic changes in revenue generation strategies. Improved fundraising practices within the party are an urgent priority, but they are certainly achievable. Our consultation indicated that our membership is fully ready to participate in the new effort.

It was also widely recognized that the fundraising strategy should not be the primary means of connection between the party structures and the membership and, indeed, that a more engaged role for members within the party is a prerequisite of successful fundraising. The party needs to avoid continuous email solicitation from members without providing ‘added value’ for their membership. We need to ensure there are more ‘populist’ fundraising events, alongside the ‘big-ticket’ dinners; brunches and spaghetti dinners will engage a wider range of members.

Ken Dryden summarized this in his discussion paper on finances: “Treat a prospective donor like a person... How would I like to be treated? What makes me want to get involved, give time, give money? I want to feel like I belong. I want to feel like I matter. “I don't want to feel like a ‘donor,’ a thing... I want to be treated like a person. If you do that, I'll be there. If you don't, I'm gone.”

The link between successful fundraising and authentic member and community engagements takes us to our next questions.

**“We hide ourselves by not advertising events in the paper, not telling people we are Liberals and not taking part in community change.”**

## **MEMBERSHIP AND OUTREACH**

How can we engage party members in the community? How can we attract community leaders to join the party? How can we best reach out to community groups and multi-cultural organizations?

A concern directly related to our fundraising challenges is the problem of declining membership. Membership is linked to our capacity for community outreach. We need a substantial and active membership base to attract the participation, support and engagement of members of Canada's diverse communities.

Brent Kelso from Thunder Bay-Superior North poignantly articulated the challenge: “We hide ourselves by not advertising events in the paper, not telling people we are Liberals and not taking part in community change.”

The party needs to become more appealing to potential members from all sections of our communities. This situation will improve as our national profile and our standing in the polls improves, but we need to work more effectively at the riding level in driving up our membership and in our members engaging more effectively with their wider communities. Members should attend various community functions and organize social activities such as toy drives for women's shelters or attendance at food banks and organizing dinners for the homeless. We need to walk the talk! It is only in our actions and showing our community that we care and are there for them that we will engage our members and possibly recruit new ones. These ideas were presented especially forcefully by the youth at the Liberal McGill consultation.

## **ELECTORAL DISTRICT ASSOCIATIONS AND PARTY OFFICES**

How can we best rebuild weak riding associations? How can LPC and the provincial and territorial associations better serve riding associations?

The development and activation of our membership requires effective, vigorous riding associations, but many participants expressed concern for the health of our EDAs. Our participants wanted to see much more direction and assistance to the EDAs, so that they can develop their non-campaign functions; a true Liberal presence in a demonstrable 'democracy between elections'.

We heard how the unheld ridings experience special challenges. If a candidate is defeated, we can't allow them to disappear from the party's radar screen. The candidate may be left in limbo, unsure of the party's and the EDA's support for a future candidacy. The local organization can't be allowed to wither or vanish entirely. Conservative and NDP candidates tend to remain a very visible party presence in the ridings from election to election, and are often successful on their second or third runs. We very often heard about the need to treat past-candidates with respect. They deserve an early conversation and decision without automatically assuming 'two strikes and you're out.' From Bill Graham to Siobhan Coady, there is good evidence that timing is very important in getting a great candidate elected. In the last campaign we lost Edmonton-Strathcona to Linda Duncan of the NDP who had been campaigning for three elections. Our terrific candidate, an Order of Canada recipient, Claudette Roy was newer; many 'Harper-haters' therefore went to the NDP candidate who had built her name recognition over the past number of years.

The Liberal presence needs to be very clear ‘between elections.’ A hard-working ‘ever-present candidate’ can significantly improve the Liberal fortunes in a riding. Heather Carter, our candidate in Niagara-West Glanbrook in 2006 and 2008, and her husband crunched the numbers and found that the candidates who had been nominated early and practicing ‘democracy between elections’ with townhalls and roundtables were able to do much better than the candidates nominated closer to the writ, even if they hadn’t won this time.

There was also concern expressed about factions developing within EDAs as a result of hotly contested nominations. Many highlighted the importance of the Party’s commitment to the letter and spirit of the candidate nomination rules.

Others talked about the Party’s identification of winnable and unwinnable ridings. We heard, for instance, that in certain regions, identified winnable ridings have been set aside to become the recipients of ‘star candidate’ appointments. In the past, the appointment of candidates by the Leader was very rare, but it has become much more common.

Members felt that National Office or their PTAs should provide better service. This would be aided by better accountability within the party to ensure poor performance and bad practices are not rewarded. So much of the party’s success, through its communications, data management, membership registration and other key functions is reliant on these elements of the party working effectively and efficiently.

## **DATA MANAGEMENT**

**How can we improve the party’s use of technology? How can technology best serve our ridings and our members?**

The problem of membership decline is not helped by the membership tracking operation within the party. The National Office is required under the constitution to maintain a national register of members, but it cannot do so without local cooperation or of the timely input at the PTA level. In today’s party, practices such as data sharing that would contribute significantly to the financial health of the party should not be disregarded in favour of narrow territoriality. There is a clear appetite for these problems to be resolved.

Participants recognized that information and information management are key to the electoral and fundraising success of the party. They recognized information is not being shared as well as it might be. Because some local associations don’t share their information with the National Office, there is limited availability of data on supporters. There is widespread recognition that we must enter a new phase of professional, proactive data management based on mutual trust if we are to compete as a modern, responsive political party, ending the information ‘protectionism’ that has interfered with our party’s ability to compete and putting in place the more vertical organization like that employed by the Conservatives, NDP and the Greens.

## **COMMUNICATIONS**

**How can LPC improve the party’s internal communications? What do members want to hear from the party?**

A recurrent theme in our consultations the need for better communication practices, a topic obviously closely connected with the data management issue. The Liberal Party is a national

party. Our internal communication structure needs to more effectively promote communication between the various regions and levels of our party, including the National Executive, PTAs, EDAs and members. Working in silos is not as good as working together and exchanging information like a true federation. Ensuring this communication works both ways is essential to our party becoming more inclusive and democratic.

At present, many members believe that one of the primary communication vehicles of the party, its website, should be less top-down in its orientation. "The website is full of articles telling us all about what the Leader is doing, but this is mostly stuff we can read in the newspapers," we were told. "And the emails we get from the party seem to always be asking us for money. Why not use the website for information more directly related to the needs of the party and party members?"

Justin Trudeau's discussion paper on *En Famille* outlines a range of areas that need attention, and sets forth practical and sensible ideas regarding steps that could be taken to improve the situation.

Local websites are inconsistent and often need to be better maintained. It was clear that even in held ridings there needs to be a website for the EDA, separate from the MP site, that makes clear how to join the party, get involved and donate. We need more common technical and visual standards. People were impressed by the website template and service in the last election and would like it to continue between elections. We were told that some of the software being used by the party is obsolete and should be replaced. Discussion on *En Famille* indicated strong support for the idea that the party should be a leader in using technology to make the entire political system more open and accessible.

There is some frustration that the party is not taking advantage of some of the skills of its younger members in making use of technology, although we were told there are a number of grassroots, volunteer-led projects under way, of which *En Famille* is the best-known example.

An important caution was sounded with respect to technology. It was pointed out in both online discussion and in some of our regional meetings that not all Liberal members are comfortable with computers, and many who live in rural settings have limited or no access to the Internet. Also the party has many devoted senior members; an over-reliance on technology may sideline some of these valuable members who have contributed a great deal over many years. The problem was well expressed in our Nova Scotia workshop by a participant who stated, "There are a lot of members, citizens who are not youth but want to be involved if you'd let them and stop telling us everything should be about the youth. Ridings are different in their ability to connect to the internet."

The technological solutions available to enhance our internal and external communications may make this one of the most readily solvable challenges. There is an enormous appetite within our party for taking the steps, consistent with our broad values, necessary to become a much more accomplished organization.

**“Policy development... is the most fundamental function of a political party. Party members get engaged because of their belief in a better community, a better country, and a better world. Any party that performs this function well will invariably become the home to society’s most engaged, innovative and energetic persons. Liberals deserve nothing less than the most open, democratic and – especially – ongoing policy development process in Canada. Our party’s policy development infrastructure needs new life.”**

## **POLICY DEVELOPMENT**

**How can LPC improve the policy resolution and policy discussion process?**

The processes by which members of the party, especially “grassroots” members, contribute to the development of party policy is always a contentious issue. Our parliamentary tradition preserves a unique role for the parliamentary leadership in the development of election campaign platforms which is in considerable tension with the ideal of member involvement in policy work, particularly for those in unheld ridings. According to 2006 Red Ribbon report:

Policy development... is the most fundamental function of a political party. Party members get engaged because of their belief in a better community, a better country, and a better world. Any party that performs this function well will invariably become the home to society’s most engaged, innovative and energetic persons. Liberals deserve nothing less than the most open, democratic and – especially – ongoing policy development process in Canada. Our party’s policy development infrastructure needs new life.

This view was echoed by the Kingston Consensus Report, which concluded that “there is too little real dialog between the party’s leadership and its members.” We heard how this experience has been particularly marked by members in rural ridings, which are often unheld ridings. A crucial part of a 308 riding strategy must be to bring these members into all our party processes, including ensuring their perspectives are represented by caucus members every Wednesday in the caucus meetings.

François-Xavier Simard, President of the Regional Commission in Quebec stated at the Laval consultation that it is imperative for the party establish a “regional electoral platform” which considers the needs and interests of francophones in Quebec if we are going to make any inroads in regaining the confidence this electorate. Similar sentiments were echoed at the Edmonton consultation.

The isolation of party members from policy input is a major factor contributing to cynicism. Yet the pathway to better finances lies right through this territory. As one member stated in an online contribution, “As a Canadian and a Liberal, I am not going to be inclined to lend financial assistance if there’s no 2-way dialogue between me and the party. There has to be a motivation, one has to feel as though he has a stake in the direction the party takes.”

The party’s current experiment in policy development for the Biennial Convention has shown promise but it will need to be reviewed in terms of how well it succeeds in allaying the cynicism of members who wish to contribute. In an analysis of the present system, Ron Hartling, a well-regarded party volunteer and the founder of *En Famille*, suggests that it does not provide sufficient opportunity for reasoned debate. There is no systematic process for engaging subject-matter experts or drawing in information about the policy context that could be helpful in shaping sound proposals. We must continue to develop mechanisms, online and through meetings, to enable members to contribute their concerns, insights and knowledge to the party’s policy development process.

Liberals from coast to coast have a visceral understanding of what it means to be a member of this party. In our consultation, we found members using the same kind of language whether they lived in Quebec, Atlantic Canada, central Canada or the West. Participants in our workshop in Vancouver said they want the party to “facilitate and support the development of core values and enable members to give meaning to the word ‘Liberal.’”

Contributors to our commission discussions wish to ensure that our policies, and the processes we use to develop them, as well as every other aspect of the party's operations, reflect these deeply cherished principles. This requires the party to maintain open channels for the flow of ideas, engagement and energy from the grassroots of our party. There must be representation on all policy commissions of members of the riding associations so that information sharing regarding policy is reciprocal.

The members of our party are eager to contribute to the development, dissemination and implementation of policies which will meet the challenges of our time consistent with our core values. They want a party which functions in ways which reflect these values. They want future Liberal governments' policies and governing decisions, and style of governing, to truly embody these values. They are inspired by our new Leader to believe all this is possible. We have the opportunity to re-energize the party, and defeat the cynicism and fatigue from which we are emerging.

There was still clearly an interest expressed in holding a proper 'Thinker's Conference' like the lovingly remembered Aylmer and Kingston policy conference in which outside experts would be able to speak to the 'new thinking' on a number of policy issues and then the Liberal members would be able to participate in a true deliberative dialogue that would lead to a consensus on future party policies.

## **GOVERNANCE**

### **How can we improve the structure of the party nationally, provincially, and locally?**

Liberals want their values to infuse the party, but they also want these values to be reflected in the formal processes which shape the party and facilitate its performance. Along with the formal policy development mechanisms, members wish to see all aspects of party governance become fully transparent, accountable and responsive.

Party members don't know how the party works. Participants in our Nova Scotia consultation said, "Give us a simple thing like an organizational chart that shows lines of communication, clarified roles and responsibilities." They and others also would like to see more accountability in the organization...In Edmonton there was a request for an LPC Annual Report.

Any issues with our Executive are not restricted to transparency and accountability to the members. There is a general lack of clarity of roles and responsibilities in the party. This applies not only to components of the structure manned by full-time staff but also to various volunteer-based committees and task forces, of which there seem to be a lot.

Some directors voiced concerns about the National Executive. It was suggested to us, for instance, that the Executive could have done a better job of rising to the challenge presented by C-24. They were pleased with the reforms of the Executive instituted in the party in 2006 that resulted in a diminution in the size of what was an unwieldy body. However, some members of the Executive compared it unfavourably to other boards of directors. The Executive apparently is subject to the problems encountered by many governance bodies, including the lack of understanding of some directors of their role and their fiduciary responsibilities. Executive officers require adequate orientation and training to fulfill a very demanding role.

There is also a tendency for some to focus mostly on the interests of their particular jurisdiction rather than on the national picture, and for some to want to micro-manage the affairs of the

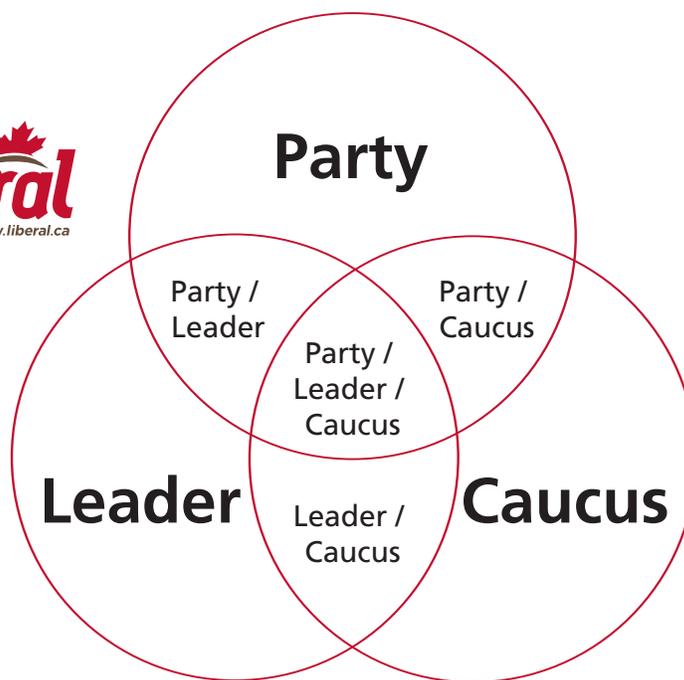
**I believe ‘silos’ have grown up in our party – the Leader’s Office, national caucus, LPC, the PTAs, and the ridings all constituted ‘silos’ that didn’t work well together and didn’t communicate well. We need to break down those walls and work together. It’s starting to happen, but we aren’t there yet.**

National Office. This latter problem is not helped by the fact that the National Executive has a “National Management Committee” within it. The use of these terms – executive committee and management committee – for the top decision-making bodies of the party is confusing and inconsistent with accepted practices in both the corporate sector and the non-profit world.

In addition, staffing levels have declined at the National Office and the PTAs, this, in part, a reflection of the loss of revenue arising from our performance in the last election and from our fundraising challenges. But there is a perception that people are sometimes hired into positions without any job postings not because they have the capabilities required for the job, but because of who they know.

The organization is not cohesive. An entity as large as the Liberal Party will always have a certain amount of disarticulation, but too much of this can seriously impede the party’s ability to do its job. As Doug Ferguson pointed out in his blog,

I believe ‘silos’ have grown up in our party – the Leader’s Office, national caucus, LPC, the PTAs, and the ridings all constituted ‘silos’ that didn’t work well together and didn’t communicate well. We need to break down those walls and work together. It’s starting to happen, but we aren’t there yet.



We need reforms in the operation of the party from the most senior, central elements of the organization, down through the PTAs to the EDAs. This is essential, not just so that the party becomes a ‘well-oiled machine,’ but so that the commitment and enthusiasm of our members and supporters can be boosted and harnessed in the crucial work of engaging with communities across Canada, so that the Liberal message is spread through all our endeavours.

One of the challenges we have faced, which certainly impacts our performance as a political organization, has been the almost constant turnover of key personnel in the party structure. As President Doug Ferguson pointed out in his blog on *En Famille*: First, there is a problem in our

**“First, there is a problem in our party with continuity. In the past 5 1/2 years we have had: 5 leaders, 4 national presidents (with a fifth one coming in May), and 6 national directors. There have been two or three major turnovers in party staff in that time. With all these changes, we lose time, we lose institutional memory, and we lose people. Second, in the past 5 1/2 years we have had two leadership conventions (with a third coming in May), and three general elections. We have had to focus on leadership and election readiness, and we have not focused enough on the party.”**

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We may need to develop more effective mechanisms for staff retention through the inevitable transformations to which our party was subject.

Ironically, the rapid turnover of personnel within the staff and among the volunteer decision-makers of the party does not open the party to rapid change. Rather, participants felt that the party has experienced difficulty in developing and implementing reforms, despite members' desires for change. The establishment and activity of this Change Commission obviously goes some way to responding to this perception, but it will be important that the work of the commission results in real changes discernible to the members.

The problems identified with the party structures were not simply matters of pure organization. Participants spoke about the need to increase the level of trust between different elements of the party; for instance between EDAs and PTAs, or between PTAs and the National Office. Contempt for 'Head Office' is common in all organizations, but we must work to address it. It is crucial that the paid members of the party understand that they serve the volunteers, and not the other way round. The party must work to heal; a unified party is built on experiences of mutual support in the pursuit of common purpose.

One manifestation of the trust problem is that some participants felt very negatively about the aftermath of the 'internecine warfare' associated with leadership struggles in recent years. One *En Famille* contributor explained that he chose to dissociate himself from the party for several years. He told us, "I saw Liberal fighting Liberal... I lost my stomach for it, I did not think it was right... There did not seem any reason to stay involved, so I focused on my family and business and the charitable world."

Perhaps the most important issue of trust concerns the feelings of the broad membership about their place in the party. The Constitution states that a fundamental purpose of the party is to "provide a forum for members... to have their say and influence the policies and platform of the party." Many members who communicated with us do not feel that they are being provided with the opportunities that are their right under the constitution. They have been disenfranchised. This in turn has not build the necessary amount of trust within the party. Linda Julien expressed the desire for change during our consultation in Laval: "Activists cannot be used as instruments for the party; the party must be the instrument for its members."

Disenfranchisement has had far-reaching effects. As Tim Roy of Wild Rose put it: "The most critical challenge facing the party is the disenfranchisement that grass roots members feel with the party Executive and elected members. I believe this has resulted in party members becoming inactive due to their realization that they have very little input into policy formulation. It's also meant they've held back on their regular financial contributions, which is evidenced by the current incredibly low number of regular contributors to party coffers."

A political party can hope for nothing more than a membership that wants to be involved at every level in the operations of the party. This is a deep, genuine and treasured desire of our

members. There can be no better sign of the future health of our party, but we need to make the changes necessary to harness, rather than frustrate, this vital commitment. Obama's community development model has demonstrated the success in turning every supporter into a worker, a policy source and then a donor. They have perfected a model in which a supporter with four hours to contribute can be immediately plugged into four hours of meaningful work.

Too often, the constitutional procedures of the Party are neglected, only adding to the distrust and frustration. The issue most frequently raised during our Commission's consultation in Laval was the need for the Party and its executives to observe the constitution.

Our Party must work hard, not just to update our Constitution, but to ensure it is respected by PTAs, EDAs and the membership, and that every assistance is given to ensure that it can be, and is, followed. Members felt very strongly that infractions should entail consequences.

We must ensure that every aspect of our party is responsive to the concerns and contributions of our members and supporters, that our systems of operation, and especially of party governance, are transparent and accountable, that all members and regions can feel satisfied that their treatment by the party is fair, and that our members have good opportunities to make their contribution to the future of their communities, to Canada, and to the world, through the Liberal Party of Canada.

## Signs of spring

The good news is that signs of renewal, like those of spring, are starting to appear in the party, though some may not yet be invisible to grassroots members.

Among these, the most important is the installation of a new National Leader who brings a fresh perspective on Liberalism and a serious interest in party renewal at all levels.

The appointment of a new National Director with extensive executive experience in the charitable sector, and a proven record in fundraising for public purposes, will enable us to overcome one of our most significant challenges. Already we have seen huge progress – from 800 people at the Leader's dinner in Edmonton to 500 (and 100 on a waiting list) in Halifax to the sold out crowd in Toronto raising almost \$1 million and turning away over 100 people, it is clear that we are on our way back.

The adoption by the party of a national membership system, with national rules, a standard fee and a national, and permanent, membership card, which will contribute to the unity of the party and the professionalism of its operations.

Another area in which the party is beginning to make progress is the use of technology to foster citizen engagement. There is a growing level of knowledge and sophistication in Canada and the USA regarding tools, techniques and technology that can be used in lieu of conventional town hall meetings for meaningful consultation of members on a wide range of issues. The growing use of En Famille – a volunteer conceived and operated initiative – to share information among members and to invite comment on both policy and party renewal is a remarkable development.

The launch of the new Liberalist to replace the imperfect National Membership Registry and the ManageElect system will make a huge difference. This system, widely used by the Democratic Party in the USA, makes it possible to collect contact information for both members and 'visitors'

to Liberal events, gradually building a national database that can be used for purposes of information sharing, policy development and fundraising. The idea is that Liberalist will be widely available to many party members – MPs, riding presidents, Senators, others – to collect and manage information about new and existing contacts.

We are also seeing changes to practices regarding the sending of emails to party members, aiming to provide more substance, less frequency, and more targeted approaches to fundraising rather than soliciting donations with every email blast. In addition, revised practices for answering emails to the party, many of which went ignored or unanswered in the past – including even some from people expressing interest in donating to the party – will ensure a more professional level of response to the public.

We believe that party members will be impressed to see Wayne Easter's report as Caucus Accountability Officer. He has been able to track the actions on the priority resolutions from the last convention. We think that members will be surprised to find out that many of them actually did become part of the platform. Others were dealt with seriously in other ways.

Finally, the renewed interest in the reform and renewal in the party is crucial for the long term future of the party. Joyce Murray has effectively chaired a Thursday morning Reform Caucus that has acted as a clearing house for all the renewal activities led by caucus members.

Online and at every one of the regional meetings, we heard clearly from the grassroots that the work of the Change Commission needs to continue. From calls for 'no expiry date' to the call for the Change Commission to be institutionalized, we heard that the Change Commission must not merely present a report that could once again 'sit on a shelf' without the oversight required to ensure that the recommendations are properly implemented. Whatever the future of the Change Commission, we can see that our party members are committed to change, and this is perhaps the clearest sign that our party has turned the corner.

## Moving forward

The range of deliverable suggestions set out in this section embody our commitment to the development of a party that can manage the enormous complexity confronting such a large, geographically dispersed and regionalized organization. As you will see, we received valuable suggestions from participants in our consultations. These came from all across the country. We believe these proposals can make a real difference, showing us many practical ways to sustain our party's determination to become a professional, motivated – and winning – organization. In Appendix B, we set out the range of deliverables we are proposing, divided into those required in the next few months, in the next year, and by the next Biennial Convention.

It is important to keep our focus on these ultimate objectives; a point made to us beautifully by Thomas Sutton of Sudbury: "When you're learning how to drive they always tell you to look at where you're going. This is true for most forms of motion; if you want to be a good skater or skier, you cannot be stuck watching your feet. You need to look where you want to go. We should pick a destination and keep our eyes on it and trust that our 'legs' will not fail us."

There is a good deal of talk in the party today about the need to rebuild 'from the bottom up'. We agree wholeheartedly with this approach. We believe that responsiveness to the grassroots and a high degree of professionalism go hand in hand. Our consultations brought this home to

us time and again. When given the opportunity to voice their hopes for the party and their ideas about how these hopes can be realized, party members expressed their desire for high performance, and gave us many suggestions that will help us achieve it. The central objective of reform should be to enhance the party's capacity to perform its core functions, and the key to doing that in our view is to put the sidelined membership of the party back on centre ice.

We also need leadership from leaders. From the top of the party, from the caucus and the parliamentary leadership, from the National and PTA Executives, and from the staff, and, closer to home, from EDA Presidents and Executive officers, members should hear recognition of the difficulties facing the party and a powerful commitment to renewal or reform. There is a need for inspiring language that will reassert the importance of the membership. Likewise members need to hear an affirmation of foundational values and a commitment to honour the constitution. Members will need to see all levels of the party working together on this. The Leader's message of unity is very timely for the project of renewal. For members from east and west, north and south, the urban centres and the rural ridings, new Canadians and Aboriginal Peoples, unity means that everyone has a sense of belonging and being valued. What starts with the party membership will spread to Canadians as a whole – the Liberal Party of Canada will be the party of unity and belonging.

We need to start work on this agenda right away. Some of the steps we need to take to enhance our professionalism are either already underway, or can be completed in short order. Other changes will take more time. The more progress we are able to make toward reform before an election, the more likely it is that, in the election, we will be able to count on the support of every party member, supporter, and potential voter.

## FINANCES

**Inclusive fundraising.** It is crucial that the new fundraising initiatives coming from the National Director be embraced and implemented urgently. Our members and supporters have been reluctant to donate, but the appetite for renewal is there, and fundraising will be a key element, and beneficiary, of the party's revitalization. The Conservatives rely on making their supporters angry with and fearful of their opponents in order to provoke donations. Liberals need to be inspired to donate with a positive agenda.

We heard how important it is to our supporters that we reach out to them, and that we show them respect and appreciation. Before we ask them for money, we must provide value for party members and past donors by keeping in touch with them with information, consultation, social events and calls to action.

**Trust, transparency and accountability.** Finally, we must ensure that our party functions in every way such that our members are valued and engaged. We must create an atmosphere of trust, transparency, and accountability. LPC should prepare an annual report and send it to all members. Party members deserve to know where their money went before they are asked for more. Party policy resolutions must be taken seriously and included in the platform, or articulated as a formal commitment from a Liberal government, and we must institute effective formal mechanisms for receiving members' ideas and feedback. If the core political procedures of the party are seen to work effectively and authentically, our members will be all the more willing to make donations.

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

**Timely receipting.** When we do receive their donations, we must ensure they are properly thanked, and that they receive timely receipts. We must review LPC's process for issuing tax receipts to determine how it can issue them sooner. If delays in tax receipts are due to delays by ridings in sending fundraising documents to LPC, LPC should be proactive by calling ridings in the third or fourth quarter of each year to determine if there are any outstanding fundraising events where documents have not been sent to LPC.

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

**Improve our vehicles for donations.** We need to make it easier for members and supporters to donate, especially by improving the LPC website. Donors should be able to donate to specific areas of choice. E.g. Judy LaMarsh, work of the Commissions, Laurier Club, Victory Fund, etc.

**Recommendation 3: Improve our vehicles for donations.** LPC website should have the tools to more easily allocate funds according to donors preferences.

## **MEMBERSHIP AND OUTREACH**

**Enhance Liberal participation in the community.** One of the keys to increasing our membership is to improve our community outreach, getting involved in organizations and good works in every community. Riding associations must take the initiative between elections to reach out to their communities, and not just at election time. The party could help organize EDAs 'doing good' in their community – cleaning parks, visiting seniors homes, helping in a food bank, and any other similar project. EDA's participation in community activities should be reported to and evaluated by LPC.

**Recommendation 4: National Liberal Day of Action.** The party should organize a national day of community action involving all 308 ridings.

**Recommendation 5: Community participation reporting.** 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.

**Townhalls and roundtables.** We need to engage with community groups by bringing them into our discussions. Ridings can meet with business leaders, social agencies, institutions, farm organizations, local governments, and multicultural organizations for the purpose of listening to their issues, discussing potential solutions, and follow up in helping them achieve those solutions. These groups can be invited to town halls and board meetings. Holding town hall meetings in a non-partisan way and inviting community groups has been shown to be very effective.

**Recommendation 6: Townhalls in 308 ridings.** 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.

**Kitchen table meetings.** We also need more discussion meetings for our members and supporters. We can include identified and voters and those on the sign lists. These should include small discussion groups that can meet in coffee shops or at the 'kitchen tables' in people's homes. In rural ridings, a special effort should be made to have women reach out to women.

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

**Outreach kit.** LPC and/or Caucus should provide support for discussion meetings, with policies, speakers, and literature, perhaps in the form of an outreach kit, including "townhalls/roundtables in a box."

**Recommendation 8: Outreach kit.** Every Liberal critic could be responsible for developing at least one townhall/roundtable in a box, providing support with policies, possible speakers and literature.

**Evergreen Liberal University.** Training through an updated, evergreening Liberal University is essential to provide information and skills needed to empower our party members in these endeavours.

**Recommendation 9: Evergreen Liberal University.** Update and maintain Liberal University.

**Develop and utilize a Shadow Caucus and Virtual Advisory Committees.** In order for these outreach efforts to work in the unheld, especially rural, ridings, we should develop a Shadow Caucus representing the unheld ridings, including past candidates. This work will also help in the preparation of a 308 riding election campaign platform as well as part of 'virtual advisory committees' to the critics. They could provide expert advice, questions for Question Period and focused feedback.

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

## **ELECTORAL DISTRICT ASSOCIATIONS AND PARTY OFFICES**

**Value of EDAs.** EDAs are the backbone of the party. Many are not in good shape. The party needs to mount a concerted support initiative as an urgent priority. 308 riding strategy.

**308 riding strategy.** We heard time and again that the party must implement a 308 riding strategy. We must become competitive everywhere! We also can longer have committed Liberal members in the regions where 'it's tough to be a Liberal' feel abandoned by their party, They should be revered not ignored. Apart from anything else, if we ignore weak ridings, it allows other parties to withdraw resources from those ridings and focus their efforts defeating us in our

stronger ridings. In addition, if we boost our vote in ridings we do not win, we will receive more federal subsidy as a result.

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

**Paid Fieldworkers.** Several individuals we spoke with lamented the fact that, unlike the Conservative party, the national office has no paid fieldworkers. We need a comprehensive fieldworker program, to be started immediately, with the goal of one field worker for every 20-25 ridings, and the following basic mandate: fieldworkers must live and work in the area assigned to them; specific goals must be set for the fieldworkers; there must be effective training for fieldworkers; regular written reports must be given by the fieldworkers to LPC

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

**Post-election debriefing.** We need effectively debriefing in the unheld ridings following elections campaigns for two reasons. First, it is important to know if the defeated candidate wishes to run again, and the amount of support he/she has from the EDA and the party. Second, it is crucial to enable the EDA and the party to learn the lessons of the campaign and to hear the feedback from the candidate.

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

**Twinning program for unheld ridings.** We have already indicated the need for a Shadow Caucus to represent the unheld ridings. In addition, each unheld riding should be twinned with a Liberal MP or Senator from a riding with some similarities to the unheld riding. It is crucial that it be set out in writing what is expected from the riding and the caucus member, including visits to the riding. The MP or Senator should also function as the twinned riding's voice in caucus.

**Recommendation 14: Unheld ridings. Establish a twinning program for unheld ridings.**

**Identification of weak ridings.** We need to define weak riding associations. Criteria should be developed to identify them so that they can get additional support. Minimum standards for riding associations should be set immediately by the National Executive based on recommendations given by the Council of Presidents. This will provide criteria to identify weak ridings. These criteria will apply to unheld and held ridings; not all weak ridings are unheld, some being held ridings where a Member of Parliament is not engaged with the riding association or active in the community, and where the Constituency staff replace the work of the EDA. The Executives of identified weak EDAs should be twinned with the Executives in effective Associations, so that inexperienced Executive officers or those having difficulty can be mentored.

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

**Maintain riding profiles.** The party should maintain riding profiles so that Executive, MP or Senator twins can be properly matched. The profiles would contain such information as key census data, the economic base of the riding, whether it has a military base, its ethnic profile and whether it has a strong gay/lesbian community, etc.

**Recommendation 16: Riding profiles. The party should maintain riding profiles.**

**Develop and implement a defined commitment to rural Canada.** Rural ridings must be part of a 308 riding strategy. The party must demonstrate a commitment to rural Canada:

- Strong candidates should be sought out for rural ridings from municipal governments, farm commodity groups, and other community leaders.
- Rural ridings should be encouraged to hold early nomination meetings in order to allow our candidates time to organize and raise their profiles.
- When the party issues a significant media release, rural media outlets in unheld ridings should be called by the local riding association and asked if they would like an MP to call them, usually a “twinned” MP or a caucus critic
- A senior person with knowledge of rural issues should be working in the Leader’s office.
- LPC or LRB should develop op-ed pieces on rural issues that rural ridings can offer to local newspapers.
- The Leader’s trips across Canada should include visits to rural ridings for political purposes, and not solely for fundraising.

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

**EDA Annual Plans.** There is a need to clarify the role and expectations of EDAs; an essential prerequisite of the support initiative we have proposed. Some people seem to see riding offices mainly as a place to coordinate election activities, while others have a wider view of what EDAs should be involved in and what local Liberals should do in terms of outreach in their own communities. Much has been said in this report about the policy role of EDAs and members. In addition, EDAs can also be significant social centres for local people. No doubt there is a lot of room for variation among EDAs. There remains the need for clarification of the parameters within which that variation should occur but each should have a mission statement that clarifies their commitment. Much of this can be accomplished through activities such as outreach, training, twinning between ridings and similar measures. However, the underpinning for these activities should be a clearly enunciated statement of the importance of EDAs, their central role in the health of the party, and what the party looks to them to achieve. Every riding should be expected to have a plan (based on the minimum standards) to take them to the next election, and the plan should be filed with LPC and the fieldworker assigned to the riding. This plan should contain goals in areas such as: Communication; Fundraising; Membership; Organization and Election Readiness; Outreach; Policy; Governance; Participation in PTA and national party activities; Compliance.

**Recommendation 18: The EDA Annual Plan.** 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.

**EDA Balanced Scorecard program.** The party would benefit from a document that set forth the 'non-negotiable' elements of an EDA's responsibilities. Such a statement should also speak to the roles of key officers at the riding level, in particular the riding President and such other officers as are required, and should be signed back by the riding President. This should include the President's responsibility to pass on information received from the party to the riding Executive and members. Training through Liberal University for riding Presidents, and for other Executive officers, is essential for the success of EDAs. This would include webinars and online workbooks. The party should also facilitate twinning with neighbouring ridings, sharing of exemplary practices, and regional meetings of Presidents.

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

**EDA recognition program.** Given the need to encourage the improvements in EDA performance we have outlined, and to recognize all that has already been achieved by EDAs, the party should establish a recognition program for ridings that achieve certain benchmarks, or who achieve specific improvements. For example, a riding President whose riding reached these targets could receive an autographed photo of the Leader or could be recognized at a PTA meeting or national convention.

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

**Resources for EDAs.** There are many resources which the party should, as a matter of urgency, develop and provide for EDAs. We have noted many suggestions that were made to us, which we believe they will all prove to significantly assist our EDAs.

**Recommendation 21: Resources for EDAs.** The party should develop and make available the following resources to EDAs:

- A board training program for EDA officers, especially Presidents;
- An EDA handbook;
- An EDA balanced scorecard;
- A monitoring/evaluation criteria/reward program;
- Annual Plan template and assistance;
- EDA President's mandate letter;
- Pro-active assistance to ridings (especially rural ridings) with reports to Elections Canada;
- A website template for ridings;
- New member welcome kit;
- An EDA election readiness kit;

- Stakeholder Software;
- Questionnaire and focus group materials for EDAs to debrief lapsed Liberals, ought to be Liberals, demographic groups (i.e. youth, seniors, aboriginals, ethnic groups);
- Quality Surveys for EDAs to administer to their Executive and members regarding service from National and PTA offices and fieldworkers.

**Relationship between EDA's and PTA's and National Office.** We urgently need to improve the ways that the EDAs relate to the PTA and National Offices. Some members seem to think that the purpose of the National Office is simply to be a kind of service centre for other elements of the party, while others see it as the guiding hub of a large wheel. The National Office must be both; we need to clarify the implications of this for its relationships with other parts of the party, and for its staffing and structure. Moreover, it seems likely that the expectations placed upon the National Office far exceed its capacity. There is a need to set priorities and determine what is most important to do now, and what has to wait until more resources become available. The same reflection is required for the PTAs.

If reform is to become reality, the party will need to place individuals with a known commitment to openness and member engagement, trusted known reformers, into positions of influence, whether as volunteers or paid staff.

**National Volunteer Bureau.** One of the ways in which some of the work described in this report might be moved forward could be through the establishment of a National Volunteer Bureau, with the EDAs responsible for forwarding the names of volunteers to the national level.

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

**Comprehensive Human Resources Strategy.** We need to develop a comprehensive human resources strategy. The goal of such a strategy would be to build a skilled, committed, professional and accountable human capital base. The foundation of such a strategy is a well-designed organization with clear role overall HR strategy would concern itself with the recruitment, selection, motivation, retention and performance management of staff and volunteers. This requires a needs assessment, and an HR plan which builds on this to facilitate the development existing staff and volunteers, and the recruitment of new contributors, and the maintenance of the program through review and exit interviews.

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

- Job descriptions;
- A policy manual;
- Procedure manuals;
- A recruitment process;
- Retention strategies;
- Succession planning;

- A performance management plan;
- A reward and recognition program;
- Compensation guidelines:
  - Environmental scan
  - Categorize roles
  - Market survey
  - Guidelines
- A training program:
  - Needs assessment
  - Develop monthly webinars
  - Implementation.

## DATA MANAGEMENT

The party is moving ahead with its data management initiative, replacing the ManageElect system with the new software. This should meet many of the wishes expressed by our contributors regarding data management.

**Enhance our data collection.** In order to enhance our supporter database, admission to events where the Leader is speaking could be a person's email address or cell phone number – this will allow the party to contact Canadians who are not necessarily members of the Liberal Party (this was used with great effect by the Obama campaign).

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

**Establish a volunteer database.** *En Famille* should contain a volunteer database where party members with particular expertise can be contacted by ridings or candidates. Some of our most knowledgeable and committed volunteers are found among our paid staff, who contribute enormously to the party in their spare time. The inclusion of paid staff who volunteer in the volunteer database would be essential to its success. The volunteer database should be integrated with the National Volunteer Bureau (see Electoral District Associations and party offices).

**Recommendation 25: Volunteer database.** A volunteer database should be established on a web-based format.

## COMMUNICATIONS

**Communications goals.** The party has many different communication priorities: to raise money, to tell people what the Leader is doing, to seek views on policy ideas, to organize events, and others. The party must become able to meet all these communication objectives.

Justin Trudeau addressed some of the concerns with the party's communications strategy in his discussion paper for the Commission. We understand that some of his suggestions are already being implemented: "Remember that every person on the list is there because they choose to be: they're already Liberals, so they don't need to be convinced that the other parties are a bad choice. What they need is to be provided information beyond what they'll hear on the news, without the aggressively partisan spin that's so off-putting. Appeal to the values they share, as

Liberals, offer genuine insight and analysis of the political choices we've made as a party, give out little scoops from time to time that make people feel like insiders, make them feel glad they took the time to read the email we sent, make them glad they're on the list."

**Review of Communication Practices.** There is a need for the party to examine its current communication practices and its use of technology with these considerations in mind. 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.

**Recommendation 26: Review of Communication Practices.** 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.

**Enhanced interactive internet communications.** A review of this kind would provide many good ideas regarding the redesign of the party's policy process. The party has a great opportunity to set itself apart from other parties by exploring how to make more effective use of the techniques and tools of citizen engagement. Some of this would involve the use of information technology. *En Famille*, described by one contributor as a "gift to the party," is one example of how this kind of innovation can make a difference. Caucus members should use *En Famille* in a proactive way to promote debates on current issues, and should regularly review the discussions in areas of interest, and add to the debate – if Caucus is not active in *En Famille*, it limits the benefits of *En Famille* to our party members. As an urgent priority, more French must be used in *En Famille*. *En Famille* should be easier to navigate. The party should also make greater use of the *Illuminate* software we believe will greatly enhance our party's effective communication capability. We could also employ relatively simple strategies to make more effective use of trained facilitators and to organize events in different ways.

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

**Communications networks and protocols.** We must improve the communications networks relating to the core party functions. After their AGMs, every riding should be required to send to LPC the contact information for all riding executive members, and there should be an annual or semi-annual call from LPC to the riding Presidents to confirm the information. Using this information, the individual functions of the party can be better coordinated; for instance, the national Revenue Chair must be in contact with the Fundraising Chairs from every EDA, the national Policy VP must be in contact with the EDA Policy VPs. LPC should provide a regular electronic newsletter on internal party matters to PTA and riding executives. Liberal.ca should continue to be made easier to navigate, and constantly maintained and updated. Every email sent to LPC, a PTA, or a riding should be answered in a timely fashion.

**Recommendation 28: Communications networks and protocols.** 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.

**Provide “insider” information to party members.** The party should provide information to party members that is not reported in the media, and without aggressive partisan spin, but which offers insight and analysis which treat our members as insiders; in other words, we should offer value in the form of information. The party should not ask for donations in every communication, although there should be a donations link or form in every one. The new Liberalist database should be used to target messages to party members in different regions or with different interests or backgrounds; the more we meet our members’ interests and needs, the more value they will receive from our party. For the many party members who do not have access to the internet, or who only have dial-up access, especially in rural ridings, LPC should create an alternative mailing system, perhaps by grouping a number of email messages that have been sent. Telephone voicemails could also be used for this purpose.

**Recommendation 29: Information for members.** 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.

**EDA website template.** LPC should offer a website template, training and content to riding associations, and offer to host the sites as well (for a nominal fee). Ridings could use party content or their own content as they wish. Ridings should be free to design their own websites and write their own content, although these should be consistent with the branding of the party. Riding websites should include: contact information; activities, meetings and events list; ways for members and supporters to get involved; articles on party or policy issues. LPC should also develop a newsletter template for EDAs to provide at least monthly newsletters to their members. The LPC and riding websites should contain an explanation (including an organization chart) on the structure of the party, the rights of members, and opportunities to volunteer. This should be tested on new party members for their feedback. In addition, these websites should maintain suggestions boxes for members to share their concerns and ideas.

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

**New member welcome package.** LPC should create and produce a ‘welcome package’ for all new members, whether they join online or otherwise, which would contain: the rights of party members; how they can get involved; contact information for their EDA Executive; responsibilities and expectations for members (what the riding association and the party expect of our members).

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

**Develop a newsletter template.** One of the most important means of communications for EDAs is e-newsletters. LPC can assist with the development of newsletter template.

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

**Maximizing the impact of social networking sites.** LPC should have a strategy to maximize the use of social networking sites such as Facebook, MySpace and YouTube, with the goal of connecting party members, promoting policy issues, and publicizing events. LPC events should be videoed and posted on YouTube.

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

**Speaker's Bureau.** The party should maintain a Speaker's Bureau, with MPs, Senators, past candidates and future MPs, and other party officers. This will be very helpful with community outreach in the ridings. The Leader and Critics should make themselves available for online TownHall meetings as well.

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

**Provide accurate and culturally sensitive translation.** Translation has been a constant source of complaints and needs to be dramatically improved.

**Recommendation 35: Translation.** LRB must ensure highest quality French in all translated communications.

We are aware that developments are already underway on a number of these fronts. We wholeheartedly support this effort.

## **POLICY DEVELOPMENT**

**Redesigning the policy process.** In the lead-up to the Vancouver convention, there has been considerable debate about what the "policy process" is and how it should work. Many Liberals believe that members should occupy a much more central role in this process. They alluded approvingly to *En Famille* as an example of how technology can be used to foster a sense of engagement when it is driven by the right set of values.

Our Commission endorses the recommendation of Ron Hartling, the inventor of *En Famille*, that a redesigned policy process should achieve the following strategic objectives:

- Enable the party to produce and maintain a more coherent, higher-quality body of policies that will better serve the national interest while earning the electoral support of Canadians;
- Optimize the currency and relevance of the party's policies and platform by facilitating their ongoing updating and refinement in response to new information and changing circumstances;
- More meaningfully engage grassroots Liberals in policy development, better leveraging their individual and collective knowledge and expertise while reinforcing their commitment to the party and fostering a sense of community and teamwork that will help win elections; and
- Attract more politically interested Canadians to the Liberal Party by offering them a clear and immediate channel for influencing public policy through engagement with like-minded citizens.

We were also impressed by Adrian Ludwin's interesting paper on this issue.

**Review of the policy process.** A review of the policy process should be undertaken with these objectives in mind, aiming toward the substantive re-engagement of interested members and Canadians in the process and respecting the provisions of the Liberal constitution. The National Policy and Platform Committee could review and recommend to National Executive a new process whereby party members can vote on policy issues between conventions.

More specifically, we recommend that the policy development process should be done both online and by mail for those who do not have internet access. The party website should contain an explanation on how the party policy process works and how members can get involved.

**Recommendation 36: Policy process review.** A review of the policy process should be undertaken by the National Policy and Platform Committee.

**Use as many resolutions as possible.** No matter what the process, the party's election platform must use as many party resolutions as possible – otherwise the policy process is meaningless. This has been a source of considerable disillusionment in the past.

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

**Post party policies on the LPC website.** We need to do a better job communicating our policies to members. party policies should be posted on en famille so that party members know party policy on issues in real time. This should include information, updated quarterly, on how policy resolutions have been used when we are in opposition, and how they have been implemented when we are in government. Members should be encouraged to review these, discuss them and present suggestions for ongoing improvement.

**Recommendation 38: party polices on LPC website.** party policies should be posted on en famille.

**Provide vehicles to engage in policy development between Conventions.** Members should be involved in policy between Conventions. Caucus critics should invite party members, particularly in unheld ridings, to suggest questions for question period, and post on the party website a video of the question being posed in the House. They should also provide monthly newsletters, available for those who sign up, keeping readers in touch with policy and policy related developments in their fields.

**Recommendation 39: Policy development between Conventions.** Caucus critics should maintain two-way communications with party members on policy issues between elections.

## **GOVERNANCE**

**The Renewal Committee.** The Renewal Committee has been undertaking vital work for the party in the area of the party Constitution and party governance more generally. The suggestions we offer here reflect the contributions we received in the Change Commission consultations; contributions which complement the ideas developed by the Renewal Committee.

The members of our party are enthusiastically supporting Michael Ignatieff as our Leader; under his leadership, the party has regained its sense of unity and purpose. It remains essential to maintain an appropriate and effective balance between the different elements of governance in our party. There must be effective separation between the Leader's office and National Office.

**Training for the National Executive.** The National Executive needs to become a more effective forum for decision-making. Assuming that its composition will not change in the near future, one way of improving the existing entity would be to provide orientation to new members and training to the Executive as a whole. This training should be renewed from time to time.

**Recommendation 40: National Executive Training.** LPC should provide board training for members of the National Executive.

**Evaluation of paid staff.** Volunteers must be empowered to evaluate the performance of the party offices. The National Executive should be responsible for hiring and the performance evaluation of the National Director of the party.

**Recommendation 41. Hiring of National Director.** The National Executive should be responsible for hiring and firing the National Director.

**Leadership selection.** The Leadership selection process is evolving and will need to be kept under review. A perfect system may not be possible, but every effort should be made to refine and open the system. Electronic voting must be examined by the party for future leadership votes.

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

**Ensuring diversity.** There is still much work to be done ensuring diversity at all levels of the party, specifically so that the party is properly representative in terms of gender, ethnicity, Aboriginal status, sexual orientation and first language. A report should be made by party staff annually to the National Executive, the Leader, and Caucus on the party's progress in achieving equitable representation. We must continue to develop ways to maximize the involvement of youth in our party.

**Recommendation 43. Ensuring Diversity.** party staff should report annually to the National Executive, the Leader and the Caucus on progress in equitable representation.

**Nominations and Appointments Committee.** We recommend that the National Executive form a Nominations and Appointments Committee to review the procedure and to monitor these processes in the future. This committee 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.

Candidates who do not win elections should have a serious conversation with the riding association as soon as possible after the election. The sooner a decision is taken the better. An early decision for the candidate to stay will allow the candidate to work to maintain their presence in the riding, helping maintain and rebuild the EDA in an unheld riding. hose ,for

whom there was 'not a fit', be able to get on with their lives and decide how they can best make their contribution to the party.

**Recommendation 44. Nominations and Appointments Task Force** that will work in consultation with NERC. The National Executive 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. .

**Complaints and discipline procedure.** The National Executive should institute an effective complaints and discipline procedure to ensure constitutional compliance and to prevent the rewarding of bad behaviour in all operations of the party. We advocate the appointment of a volunteer Ombudsperson (perhaps a past party President) or a Discipline Committee, reporting to the National Executive. This would maintain a separation of the complaints investigation and discipline functions. The Ombudsperson or Discipline Committee would:

- Investigate allegations of violations of party rules or constitutions at the national, PTA, or riding levels;
- Investigate complaints of difficulties that members may have with the national, PTA, or riding level with services, such as tax receipts, membership forms, etc.
- Attempt to resolve the issue where possible
- Report findings to the National Executive for appropriate action.

**Recommendation 45: Complaints and discipline procedure.** The National Executive should establish complaints and discipline procedure, with an Ombudsperson or Discipline Committee investigating complaints and reporting to the National Executive.

**Code of conduct and schedule of sanctions.** LPC should develop a code of conduct for all party members and post it on the party website. At the moment, where a party member conducts himself or herself in an inappropriate manner the only punishment available is to expel him or her from the party. We recommend that the National Executive ask the Constitutional Co-Chairs to draft other consequences, such as a suspension from running for or holding party office, or from being allowed to vote at party meetings for a period of time.

**Recommendation 46: Code of conduct and schedule of sanctions.** The National Executive should establish a code of conduct and schedule of sanctions for inappropriate conduct by members.

**The Change Commission.** The Change Commission itself has been making a contribution to the governance of the party. We believe this work is not yet complete. We need support from the paid staff of the party if our recommendations for renewal are to be effectively implemented. We suggest a member of staff at National Offices be designated as having responsibility for supporting the renewal process.

We heard calls from contributors for the Change Commission to be continued to ensure that implementation of party reform actually takes place. We recommend that it make regular reports to the Leader, National Executive, and to caucus, and that annual reports be posted in *En Famille*. We are suggesting that the work of the Change Commission be continued to the next Biennial Convention, and the commission be expanded by two chairs to include a member of Liberal Youth, and a current or past paid official of the party; these perspectives are essential to an effective process of renewal.

**Recommendation 47: Continuation of the Change Commission consultations.** The Change Commission should continue working to oversee and ensure 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 geographical balance in the makeup of the Commission.

# Appendix A: Summary of recommendations

## FINANCES

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

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

**Recommendation 3: Improve our vehicles for donations.** LPC website should have the tools to more easily allocate funds according to donors preferences.

## MEMBERSHIP AND OUTREACH

**Recommendation 4: National Liberal Day of Action.** The party should organize a national day of community action involving all 308 ridings.

**Recommendation 5: Community participation reporting.** 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.

**Recommendation 6: Townhalls in 308 ridings.** 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.

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

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

**Recommendation 9: Evergreen Liberal University.** Update and maintain Liberal University.

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

## ELECTORAL DISTRICT ASSOCIATIONS AND PARTY OFFICES

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

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

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

**Recommendation 14: Unheld ridings.** Establish a twinning program for unheld ridings.

**Recommendation 15: Identify weak ridings.** Minimum standards for riding associations set

immediately by the National Executive based on recommendations given by the Council of Presidents.

**Recommendation 16: Riding profiles.** The party should maintain riding profiles.

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

**Recommendation 18: The EDA Annual Plan.** 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.

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

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

**Recommendation 21: Resources for EDAs.** The party should develop and make available the following resources to EDAs:

- A board training program for EDA officers, especially Presidents;
- An EDA handbook;
- An EDA balanced scorecard;
- A monitoring/evaluation criteria/reward program;
- Annual Plan template and assistance;
- EDA President's mandate letter;
- Pro-active assistance to ridings (especially rural ridings) with reports to Elections Canada;
- A website template for ridings;
- New member welcome kit;
- An EDA election readiness kit;
- Stakeholder Software;
- Questionnaire and focus group materials for EDAs to debrief lapsed Liberals, ought to be Liberals, demographic groups (i.e. youth, seniors, aboriginals, ethnic groups);
- Quality Surveys for EDAs to administer to their Executive and members regarding service from National and PTA offices and fieldworkers.

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

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

- Job descriptions;
- A policy manual;
- Procedure manuals;
- A recruitment process;
- Retention strategies;

- Succession planning;
- A performance management plan;
- A reward and recognition program;
- Compensation guidelines:
  - Environmental scan
  - Categorize roles
  - Market survey
  - Guidelines;
- A training program:
  - Needs assessment
  - Develop monthly webinars
  - Implementation.

## DATA MANAGEMENT

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

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

## COMMUNICATIONS

**Recommendation 26: Review of Communication Practices.** 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.

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

**Recommendation 28: Communications networks and protocols.** 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.

**Recommendation 29: Information for members.** 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.

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

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

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

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

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

**Recommendation 35: Translation.** LRB must ensure highest quality French in all translated communications.

## **POLICY DEVELOPMENT**

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

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

**Recommendation 38: Party polices on *En Famille*.** Party policies should be posted on *En Famille*.

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

## **GOVERNANCE**

**Recommendation 40: National Executive Training.** LPC should provide board training for members of the National Executive.

**Recommendation 41. Hiring of National Director.** The National Executive should be responsible for hiring and firing the National Director.

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

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

**Recommendation 44. Nominations and Appointments Task Force.** The National Executive should form a Nominations and Appointments Task Force that will work in consultation with NERC to monitor nomination procedures and incumbent protection, determination of winnable and unwinnable ridings and debrief losing candidates.

**Recommendation 45: Complaints and discipline procedure.** The National Executive should establish complaints and discipline procedure, with an Ombudsperson or Discipline Committee investigating complaints and reporting to the National Executive.

**Recommendation 46: Code of conduct and schedule of sanctions.** The National Executive should establish a code of conduct and schedule of sanctions for inappropriate conduct by members.

**Recommendation 47: Continuation of the Change Commission consultations.** 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.

## Appendix B: Schematic of Deliverables

	Short-Term by September 2009	Mid-Term Within a year	Long-Term by next Convention
<b>FINANCE</b>			
1. Issue an Annual Report		X	
2. Timely Receipting		X	
3. Improve our vehicles for donations	X		
<b>MEMBERSHIP AND OUTREACH</b>			
4. National Liberal Day of Action	X		
5. Community Participation Reporting	X		
6. Townhalls in 308 Ridings	X		
7. Kitchen Table Meetings	X		
8. Outreach Kit	X		
9. Evergreen Liberal University		X	
10. Shadow Caucus and Virtual Advisory Committees	X		
<b>EDAS AND PARTY OFFICES</b>			
11. 308 Riding Strategy	X		
12. Paid Fieldworker System	X		
13. Post Election De-briefing		X	
14. Unheld Ridings	X		
15. Identify Weak Ridings	X		
16. Riding Profiles	X		
17. Commitment to Rural Canada	X		
18. The EDA Annual Plan		X	
19. EDA Balanced Scorecard	X		
20. EDA Recognition Program		X	
21. Resources for EDAs		X	
22. National Volunteer Bureau		X	
23. Comprehensive Human Resources Strategy	X		

<b>DATA MANAGEMENT</b>			
24. Email and phone data	X		
25. Volunteer database	X		
<b>COMMUNICATIONS</b>			
26. Review of communication practices		X	
27. Interactive internet communications		X	
28. Communications networks and protocols		X	
29. Information for members	X		
30. EDA Website template	X		
31. Welcome package	X		
32. Newsletter template		X	
33. Social networking sites		X	
34. Speaker's Bureau	X		
35. Translation	X		
<b>POLICY DEVELOPMENT</b>			
36. Policy process review		X	
37. Party resolutions in the platform		X	
38. Party policies on <i>En Famille</i>	X		
39. Policy development between elections			X
<b>GOVERNANCE</b>			
40. National Executive Training	X		
41. Hiring of National Director		X	
42. Leadership selection		X	
43. Ensuring Diversity		X	
44. Nominations and Appointments Task Force		X	
45. Complaints and discipline procedures	X		
46. Code of conduct and schedule of sanctions	X		
47. Continuation of the Change Commission consultations	X		