

ONTARIO LIBERAL PARTY

RULES OF PROCEDURE FOR MEMBERSHIP

(Approved by Executive Council on June 24, 2019)

These Rules of Procedure supplement the Ontario Liberal Party Constitution. Please contact the Ontario Liberal Party office to ensure you are working from the most current version of these documents.

1. AUTHORITY AND AMENDMENTS

- 1.1 These Rules of Procedure for Membership (the “Rules”) are enacted pursuant to sections 3.17, 3.20, and 5.9(e), (f) and (g) of the Constitution of the Ontario Liberal Party (the “Constitution”) and are subject in all respects to the provisions of that Constitution. In the event of a conflict between any provision in these Rules and any provision in the Constitution, the Constitution, only to the minimum extent necessary in order to resolve that conflict, shall prevail.
- 1.2 All rules previously adopted by the Executive Council relating to subject matter addressed in these Rules are hereby repealed. All resolutions previously adopted by the Executive Council relating to subject matter addressed in these Rules are hereby repealed except to the extent that such resolutions remain consistent with these Rules.
- 1.3 Further to section 5.10 of the Constitution, Executive Council may amend these Rules at any time, subject to any limitations in the Constitution.
- 1.4 All authority assigned to the Secretary in sections 3.11, 3.12, 3.13, and 4.24 of the Constitution is hereby delegated to the Ontario Liberal Party office.

2. GENERAL REQUIREMENTS FOR ALL MEMBERS AND ASSOCIATE MEMBERS

- 2.1 Pursuant to section 3.10 of the Constitution, any individual may apply to be a Member or Associate Member of the Ontario Liberal Party if they:
 - a) have attained the age of 14;
 - b) are resident in Ontario;
 - c) support the objects of the Ontario Liberal Party; and
 - d) are not a member of any other provincial political party in Ontario.
- 2.2 Pursuant to section 3.11 of the Constitution, a new applicant must submit a completed membership application form and the applicable annual membership dues to the Ontario Liberal Party office.

3. REQUIREMENTS FOR CONSTITUENCY ASSOCIATION MEMBERS

- 3.1 Pursuant to section 2.10 of the Constitution, a Member of constituency association must reside within the boundaries of the corresponding electoral district.

4. REQUIREMENTS FOR CONSTITUENCY ASSOCIATION ASSOCIATE MEMBERS

- 4.1 Any individual who meets the requirements set out in section 2 of these Rules, but does not reside within the boundaries of the electoral district, may become an Associate Member of the constituency association.
- 4.2 Pursuant to section 3.3.1 of the Constitution, there is no limit upon the number of constituency associations in respect of which a person may become an Associate Member.

5. REQUIREMENTS FOR ONTARIO YOUNG LIBERALS STUDENT CLUB MEMBERS

- 5.1 For the purposes of this section 5 only, a current registered student is defined as someone who is either:
- a) enrolled in a class that is currently taking place at the relevant institution, or
 - b) was both enrolled in a class that took place at the relevant institution within the previous four months and is enrolled in an upcoming class that will take place within the next four months.
- 5.2 An individual must be under the age of twenty-six (26) in order to become a Member of a student club. If a student club Member turns twenty-six (26) years of age, they shall no longer have any voting rights as a Member of that student club and cannot be elected to any position in the Ontario Liberal Party or the club in their capacity as a Member of the club. Despite the forgoing, if such an individual has been elected to an office of that student club prior to reaching the age of twenty-six (26), they may continue to serve in that office for the duration of their term of office.
- 5.3 In order to become a Member of a student club, an individual must be a current registered student at the corresponding institution. If an individual ceases to be a current registered student at that institution, they shall no longer have any voting rights as a Member of that student club and cannot be elected to any position in the Ontario Liberal Party or the club in their capacity as a Member of the club. If such an individual has been elected to an office of that student club prior to ceasing to be a current registered student at that institution, they are deemed to have resigned from that office and the office shall be deemed vacant.
- 5.4 Where the Ontario Liberal Party recognizes separate clubs for different campuses of the same institution, then this Rules 5 shall apply to those different campuses as if they were different institutions.
- 5.5 An individual can only be a Member of one (1) student club at a time. If a Member joins a second student club, their membership in the first student club shall cease forthwith, and Rule 5.3 shall apply as if that person had ceased to be a current registered student at the institution corresponding to the first student club.

6. REQUIREMENTS FOR ONTARIO YOUNG LIBERALS RIDING CLUB MEMBERS

- 6.1 In order to become a Member of an Ontario Young Liberal riding club, an individual must join the corresponding constituency association. No direct membership may be issued in an Ontario Young Liberal riding club.
- 6.2 In electoral districts where the Ontario Liberal Party recognizes an Ontario Young Liberal riding club, the membership of the riding club shall be comprised of all current Members and Associate Members of the corresponding constituency association under the age of twenty-six (26) except that Associate Members shall not be entitled to vote at any general meetings of the riding club, including but not limited to, its annual meetings.

7. REQUIREMENTS FOR ONTARIO WOMEN'S LIBERAL COMMISSION WOMEN'S LIBERAL CLUB MEMBERS

- 7.1 In order to become a Member of an Ontario Women's Liberal Commission women's Liberal club, an individual must identify as a woman.

8. RIGHTS AND PRIVILEGES OF ASSOCIATE MEMBERS

- 8.1 Pursuant to section 3.28 of the Constitution, an Associate Member of a constituency association shall have all of the rights and privileges of a Member of that constituency association, except that he or she shall not be entitled to vote at a general meeting of the association, including but not limited to, its annual meetings, nomination meetings, and leadership votes.
- 8.2 Pursuant to section 3.29 of the Constitution, sections 3.28 of the Constitution and Rule 8.1 do not apply to restrict the voting rights of a person who was, on November 18, 2016, a Member of a constituency association but whose residence is not within the boundaries of the corresponding electoral district, but only

as long as the person has remained an Associate Member of the association without interruption subsequent to November 18, 2016.

- 8.3 Pursuant to section 3.30 of the Constitution, an Associate Member may hold any office on the Executive Committee of the constituency association with all voting rights attached to the position, and may be elected as a full voting delegate representing the Association to an Annual Meeting, Policy Conference or Leadership Convention.

9. FORMS

- 9.1 A membership application shall be in one of the two forms described below:
- a) the paper membership form authorized by Executive Council, and
 - b) the online membership form on the Ontario Liberal Party website.
- 9.2 The environmental levy for a blank paper membership form shall be \$2.00.
- 9.3 Upon purchase of a blank paper membership form, the purchaser must indicate the specific affiliated association for which the form will be used. The form cannot be used for a membership applicant for any other affiliated association.
- 9.4 The restriction in 9.3 shall not apply for registered Leadership Candidates. Blank paper membership forms purchased by a registered Leadership Candidate, or by someone given the authority to do so by a registered Leadership Candidate, can be used for any affiliated association. However, all membership forms so purchased shall expire and shall not be accepted after the Leadership Convention has ended.
- 9.5 Blank membership forms cannot be returned to the Ontario Liberal Party office for a refund.
- 9.6 The online membership form may only be used for a full constituency association membership. It may not be used to join for a constituency association associate membership, a student club membership, or a women's Liberal club membership. Once the technology is changed and it is available to do so, the online membership form may be used to join for a student club membership or a women's Liberal club membership.

10. DUES

- 10.1 The dues to become a Member or an Associate Member of the Ontario Liberal Party shall be:
- a) \$5.00 per year for a Member or Associate Member, from the ages of fourteen (14) to twenty-five (25) inclusive, and
 - b) \$10.00 per year for a Member or Associate Member, from the ages of twenty-six (26) to sixty-four (64) inclusive, and
 - c) \$5.00 per year for a Member or Associate Member from the age of sixty-five (65) or older.
- 10.2 Membership dues are required for all Members and Associate Members, but dues shall be waived for a membership application or membership renewal in a student club or women's Liberal club if the applicant or Member is a current Member of a constituency association.
- 10.3 Pursuant to section 3.26 of the Constitution, the membership dues payable by each applicant or Member shall be paid by the applicant or on their behalf by an immediate member of the applicant's or member's family.
- 10.4 Dues that accompany a paper membership form can be paid by cash, money order, cheque, or credit card.
- 10.5 Dues that accompany an online membership form must be paid by credit card.
- 10.6 Membership dues shall be remitted to the Ontario Liberal Party office. 50% of the dues shall be retained by the Ontario Liberal Party. 50% of the dues for constituency association memberships shall be credited to the respective constituency association. 50% of the dues for student club memberships shall be credited to the Ontario Young Liberals. 50% of the dues for women's Liberal club memberships shall be credited to the Ontario Women's Liberal Commission.
- 10.7 Membership dues are non-refundable once processed. This includes membership dues paid to join a student club or women's Liberal club, that were later discovered to be unnecessary because the individual was already a member of a constituency association.

11. PERIOD AND DURATION

- 11.1 Pursuant to section 3.2 of the Constitution, the Ontario Liberal Party membership period shall be January 1 to December 31, inclusive.
- 11.2 The minimum number of years for which a membership or associate membership in a constituency association may be purchased is two (2) years.
- 11.3 The only number of years for which a membership in a student club or women's Liberal club may be purchased is one (1) year.
- 11.4 Pursuant to section 3.3 of the Constitution, membership shall expire at midnight on December 31 of the year in which a single year membership is granted, provided that, where an applicant becomes a member on or after October 1 of a given year, the membership will expire at midnight on December 31 of the following year.
- 11.5 Pursuant to section 3.4 of the Constitution, multiple year memberships, of up to five (5) years in duration may be obtained for a constituency association on the following terms:
- a) the fee for a multiple year membership shall equal the annual membership fee for the class of membership obtained, multiplied by the number of years for which the membership is to be in effect;
 - b) a multiple year membership is not transferable from one association or another;
 - c) a multiple year membership expires on December 31 of the last year of membership; and
 - d) if a multiple year membership is granted on or after October 1 of a particular year, then despite the fact that it becomes effective upon being granted, the year in which it is purchased shall not be considered in determining its duration.

12. SUBMISSION REQUIREMENTS

- 12.1 Membership forms and dues may only be submitted to the Ontario Liberal Party office.
- 12.2 A submitted membership form of any type must include the applicant's valid and current:
- a) first name and last name;
 - b) full residential street address;
 - c) email address;
 - d) phone number; and
 - e) date of birth.
- 12.3 A submitted paper membership form must indicate which association the applicant wishes to join.
- 12.4 A submitted membership form may, if the applicant does not have their own email address, include instead the valid and current email address of an immediate family member.
- 12.5 For the purposes of Rule 12.6, the "Designated Official" is:
- (a) the Chief Returning Officer for a Leadership Election Process, from the date that they are appointed until the adjournment of that Leadership Convention;
 - (b) with respect only to a single affiliated association and a particular general or nomination meeting of that affiliated association, the Returning Officer appointed for that meeting, from the date of such person's appointment until the adjournment of that meeting; and
 - (c) in all other cases, the Executive Director.
- 12.6 The Ontario Liberal Party office may take such steps as it deems necessary in order to confirm the validity of the information provided on a membership application form or an accompanying list, including, but not limited to, testing the email addresses and phone numbers of a random sample of applications in a bulk submission. If the Designated Official becomes aware of multiple instances of what they reasonably believe to be deliberate misrepresentation within a bulk submission, they may direct that the entire bulk submission be rejected and returned to the person or campaign who submitted it.

- 12.7 If twenty-five (25) or more paper membership forms are submitted in bulk at one time or over the course of a 72 hour period, the submission must meet the following requirements, failing which the forms will not be accepted:
- a) in addition to the membership forms themselves, the Ontario Liberal Party must be in receipt of an electronic spreadsheet, in the format prescribed by the Ontario Liberal Party office, containing all of the information from all of the paper membership forms submitted;
 - b) the membership forms must be submitted together with an alphabetized and complete printed copy of the electronic spreadsheet, in the format prescribed by the Ontario Liberal Party office;
 - c) the membership forms must be sorted at the time of submission, in alphabetized sequence in the exact same order as the printed list referred to in Rule 12.4(b); and
 - d) the full amount of membership dues payable in respect of all forms submitted.
- 12.8 In addition to the applicable membership dues, paper membership forms that are submitted in a quantity of twenty-five (25) or more less than four weeks prior to the Qualifying Date for a Leadership Convention must be accompanied by the following processing fee:
- a) \$1.00 per form for forms submitted 0 to 167 hours prior to the Qualifying Date deadline;
 - b) \$0.75 per form for forms submitted 168 to 335 hours prior to the Qualifying Date deadline;
 - c) \$0.50 per form for forms submitted 336 to 503 hours prior to the Qualifying Date deadline; and
 - d) \$0.25 per form for forms submitted 504 to 671 hours prior to the Qualifying Date deadline.
- 12.9 The Nomination Commissioner may decide to impose the same processing fee for paper membership forms submitted prior to the date on which persons must be members in good standing of the constituency association in order to be entitled to vote at a nomination meeting.
- 12.10 In determining whether twenty-five (25) or more paper membership forms have submitted at one time or over the course of a 72 hour period, regard shall be had to the number of forms submitted by a single person or on behalf of a single leadership or nomination contestant in any 72 hours period.

13. ACCEPTANCE DATE

- 13.1 The following rules shall be applied in determining the date of acceptance of valid paper membership forms submitted and accepted in accordance with Rule 12.
- a) The acceptance date for paper membership forms that are received at the Ontario Liberal Party office on a business day prior to 5:00 p.m. shall be that date.
 - b) The acceptance date for paper membership forms that arrive at the Ontario Liberal Party office after 5:00 p.m. or on a non-business day, shall be the next business day.
 - c) An exception to 13.1(a) and (b) shall be if paper membership forms were submitted by commercial courier and the date the package was accepted by the courier is clear and legible or has electronic tracking, then the acceptance date of the memberships shall be the date the package was accepted by the courier, unless the time stamp is after 5:00 p.m., or the date is a non-business day, in which case it shall be the next business day.
- 13.2 The date of acceptance of valid online membership forms submitted prior to 5:00 p.m. shall be the date they were submitted. The acceptance date for online membership forms submitted after 5:00 p.m. shall be the following day.

14. MONTHLY DONORS

- 14.1 A “Monthly Donor” is any individual who is currently donating to the Ontario Liberal Party as part of any monthly donation program that is administered by it, including any program that is branded as an Ontario Young Liberals or Ontario Women's Liberal Commission fundraising program.
- 14.2 An individual who registers as a Monthly Donor shall be granted a one year membership in the constituency association for the electoral district in which they reside, and Rule 13 shall be applied as if the registration of

that Monthly Donor constituted the receipt of a membership form. In addition, if the monthly donation is directed to one or more constituency associations for electoral districts other than the one in which the donor resides, then the Monthly Donor shall also be granted a one year associate membership in each of those constituency associations, subject to the acceptance date rules in section 13.

14.3 On October 1 of each year, each membership granted to each current Monthly Donor in accordance with Rules 14.2 shall be renewed for the forthcoming year.

15. RENEWALS

15.1 The Ontario Liberal Party office may use a specific membership renewal form for membership renewals.

16. IMMEDIATE PAST MEMBERS

16.1 Pursuant to section 2.9 of the Constitution, during the period from January 1 to March 31 of a particular year, and only during that period, an Immediate Past Member is a person whose membership expired on December 31 of the immediately preceding year.

16.2 Pursuant to section 3.12.2 of the Constitution, an Immediate Past Member who renews their membership on or prior to March 31 of a particular year shall be deemed for all purposes to have been a current member of the association throughout that year.

17. MAINTENANCE OF MEMBERSHIP LISTS AND ACCESS TO INFORMATION

17.1 The list of Members and Associate Members of the Ontario Liberal Party and affiliated associations shall be maintained by the Ontario Liberal Party office on behalf of the Secretary.

17.2 No person shall have access to a membership list unless they have completed the confidentiality form prescribed from time to time by the Executive Director, filed a written request to access a membership list, and continue at all times to meet the position criteria outlined herein.

17.3 Subject to Rule 17.2, the Executive Director, and any additional individual approved by the Executive Director, shall have access to membership information for the purpose of administering and maintaining the membership information.

17.4 The "Liberalist Activation Date" means the day on which the Executive Director determines that the membership information of the Ontario Liberal Party is reliably available through the Liberalist database system.

17.5 Prior to the Liberalist Activation Date, membership information shall be provided to persons qualified in accordance with this Rule by the Ontario Liberal Party office by export from the Family database.

17.6 On and after the Liberalist Activation Date, membership information shall be provided to persons qualified in accordance with this Rule by the Ontario Liberal Party office through the Liberalist database.

17.7 Subject to 17.2, and prior to the Liberalist Activation Date, the following individuals may have access to the membership information:

- a) the President of a constituency association, student club, or women's Liberal club, for the applicable association;
- b) an individual authorized by the Executive Council for rebuilding a constituency association, for the applicable constituency association;
- c) an elected Liberal Member of the Ontario Legislature and their staff, for the applicable constituency association;
- d) a nominated Liberal candidate for an upcoming election, for the applicable constituency association;
- e) subject to the approval of the Returning Officer, the approved candidates for nomination and representatives authorized by the approved candidates for nomination, after the approval of a Nomination Plan that includes that person as a candidate at the nomination meeting, for the applicable constituency association;

- f) subject to the approval of the Chief Returning Officer, the registered Leadership Candidates and representatives authorized by the registered Leadership Candidates, on a timeline as determined by the Chief Returning Officer;
- 17.8 Subject to 17.2, on and after the Liberalist Activation Date, in addition to the individuals in Rule 17.7, the following individuals may also have access to the membership information:
- a) the Secretary of a constituency association, student club, or women's Liberal club, for the applicable association;
 - b) any individual authorized by the President of a constituency association, student club, or women's Liberal club, for the applicable association;
 - c) the Leader and any individual authorized by the Leader;
 - d) the Ontario Young Liberals President and any member of the Ontario Young Liberals executive authorized by the Ontario Young Liberals President, for the applicable student clubs;
 - e) the Ontario Women's Liberal Commission President and any member of the Ontario Women's Liberal Commission executive authorized by the Ontario Women's Liberal Commission President, for the applicable women's Liberal clubs; and
 - f) each Regional Vice-President, in respect only of affiliated associations within their respective region.
- 17.9 In applying this Rule, and despite any provision herein to the contrary:
- a) Executive Council may, by resolution, restrict access with respect to one or more specified associations;
 - b) the Nomination Commissioner may restrict access for specific constituency associations prior a candidate being nominated;
 - c) the Chief Returning Officer for a Leadership Election may restrict access from the date of their appointment until the adjournment of that Leadership Convention.