



CHARTERED PROFESSIONAL ACCOUNTANTS OF ONTARIO

CAMPAIGN POLICY

Made by the Governance and Nominating Committee pursuant to section 34.3 of
Regulation 3-1 on May 8, 2019, and effective as of May 8, 2019

Last amended on June 9, 2022

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CAMPAIGN POLICY

Application

This Campaign Policy (the “Policy”) is made by the Governance and Nominating Committee pursuant to section 34.3 of Regulation 3-1: Council Nomination and Election Process (“Regulation 3-1”) and applies to all Candidates.

Definitions

1. In this Policy, capitalized words shall have the same meaning as they do in the Act and By-law and, for the purpose of this Policy:
 - 1.1 “Candidate” means a Member who is qualified in accordance with section 3.3 of the By-law and nominated for election to the Council;
 - 1.2 “Campaign Materials” means any flyers, pamphlets, stickers, videos, Candidate photographs, posters, brochures, websites, social media posts, advertisements, or other electronic or physical materials used to promote a Candidate in connection with their election to Council.

Campaign Process

Solicitation

2. Each Candidate shall be entitled to solicit votes for their election to the Council beginning two Business Days after the later of: (i) the close of nominations; or (ii) the confirmation of the Candidate’s eligibility by the Office of the General Counsel, provided that the Candidate and any representatives acting on behalf of the Candidate:
 - 2.1 conducts themselves at all times in a manner which will maintain the good reputation of the profession and CPA Ontario;
 - 2.2 without limiting the generality of section 2.1,
 - (a) complies at all times with all applicable privacy laws, the By-Laws, Regulations and policies of CPA Ontario, including the CPA Ontario Privacy Policy and CPA Code of Professional Conduct and this Policy;
 - (b) does not make false or misleading statements, and that any factual information provided is verifiable;

- (c) does not discredit, disparage or denigrate other Candidates or members of the Council;
 - (d) does not disclose confidential information of CPA Ontario; and
 - (e) upholds standards of professionalism.
- 3. In order to protect the privacy, confidentiality and security of its Members' personal information, CPA Ontario will not provide a Candidate with the email addresses or telephone numbers of its Members.
- 4. The Member list, including Member mailing addresses, is considered property of CPA Ontario and shall only be distributed to and used by a Member in accordance with the *Not-for-Profit Corporations Act* or as otherwise approved by CPA Ontario. The Member list, when requested by a Candidate in accordance with the *Not-for-Profit Corporations Act*, shall be provided in an electronic format at no cost.
- 5. Candidates shall not engage in mass solicitation by telephone or email during the election process, including but not limited to robo-calling or bulk emailing. For greater certainty, solicitation by mail using the mailing address obtained in accordance with the *Not-for-Profit Corporations Act* shall be permitted, in addition to solicitation by social media or email to individuals with whom the Candidate has a pre-existing professional, personal or family relationship. A Candidate shall not make unsolicited phone calls or send unsolicited emails or social media messages without the express or implied consent of the recipient.

Campaigning through Social Media

- 6. Subject to the requirements of section 2, each Candidate may post on their social media for the purpose of increasing awareness about their candidacy.
- 7. CPA Ontario has authority to monitor social media postings made by Candidates to ensure compliance with this Policy.
- 8. Candidates shall consider all information posted on social media and its effect on the public perception and reputation of CPA Ontario.

Campaign Materials

- 9. Candidates shall be permitted to campaign using Campaign Materials, provided that any Campaign Materials shall be purchased at the sole cost of the Candidate and such costs shall not be reimbursed by CPA Ontario under any circumstance.
- 10. CPA Ontario reserves the authority to review Candidates' Campaign Materials to ensure compliance with this Policy, all applicable Regulations and the By-law.

11. Candidates shall identify themselves on any Campaign Material distributed and indicate that they are seeking election to Council.
12. Candidates shall be responsible for the actions of any representatives acting on behalf of the Candidate and shall ensure that such representatives comply with this Policy.

Endorsements

13. Members may support or endorse Candidates, provided that any statements of support or endorsements shall not contain CPA Ontario's logo and shall not imply an endorsement by CPA Ontario. Candidates shall not solicit or accept endorsements by: (i) Members employed by CPA Ontario, CPA Canada or the other CPA provincial bodies, or (ii) members of any Regulatory Committee or Adjudicative Committee of CPA Ontario.

Complaint Process

14. Complaints arising in connection with a breach of this Policy shall be made to the Office of the General Counsel, who shall:
 - 14.1 If the conduct complained about is, in the view of the Office of the General Counsel, a possible breach of the CPA Code of Professional Conduct, forward the complaint to the Professional Conduct Committee or the Director, Standards Enforcement pursuant to section 6 of Regulation 15-1 Complaints; and
 - 14.2 Forward the complaint to the Governance and Nominating Committee for review pursuant to section 15.

Sanctions

15. The Governance and Nominating Committee shall have the authority to impose one or more of the following sanctions on any Candidate who violates this Policy:
 - 15.1 Require the Candidate to:
 - (a) change, remove or stop sending Campaign Material;
 - (b) change, remove or stop posting to social media;
 - (c) issue a retraction;
 - (d) take any other action which the Governance and Nominating Committee considers necessary to protect the integrity of the election process and/or the reputation of the profession, the membership, any Member, or CPA Ontario; and/or

15.2 Disqualify the Candidate.

Any sanction imposed under this section 15 shall not preclude, and shall be in addition to, any action that may be taken by the Professional Conduct Committee or sanction that may be imposed by the Discipline Committee as a result of a referral under section 14.1.

16. Any failure by a Candidate to abide by a sanction imposed by the Governance and Nominating Committee pursuant to section 15, shall be deemed to be a fresh complaint arising in connection with a breach of this Policy and shall be referred to the Office of the General Counsel. The Office of the General Counsel shall deal with such complaint in the manner set out in section 14.