

HOW TO REBUILD THE LIBERAL DEMOCRATS

By Dr Mark Pack



Liberal
Democrat
Newswire

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Introduction

In the summer of 2015, the former Cambridge MP David Howarth and I set out a new strategy for the Liberal Democrats, focused on building up a larger core vote for the party.¹ It has since become a frequent reference point, perhaps even the standard reference point, in debates about the party's strategy. Attempting to compare our plan with the party's actual subsequent strategy, however, falls foul of the lack of clarity as to quite what the current strategy is.

There has been a sequence of different policy, campaigning and messaging priorities in the last year, but no clear overall strategy. Or, to be fair to party leader Tim Farron, the strategy since his election in July 2015 has been not to have a strategy and instead rather rely on a nimble reaction to events. There is certainly merit in that approach, and successful third party leaders have often been noted for their willingness to focus on the short term opportunities to seize scarce media attention.

The risk, however, with that approach is that you end up going round in circles rather than progressing. Hence education was first out as a priority but is now back. Or the target for 100,000 party members was floated, quietly side-lined and then returned.

Even worse, without clear direction the natural momentum is to take the easiest, most initially appealing option at each turn, which can lead a party into a political cul-de-sac. That in part is the story of the Liberal Democrat build-up prior to May 2010. Overall that story is a positive one, but it shows the dangers of falling prey to such tempting cul-de-sacs, in this case the temptation of accumulating support in a way that brought headline triumphs but was bound to fracture horribly in the face of the pressures of a hung Parliament. If your voting support is heavily dependent on a mix of people who really dislike the Tories, people who really dislike Labour and people who really dislike all politicians, then whatever you do in a hung Parliament, disaster looms.

It requires strong self-discipline not to charge down every inviting cul-de-sac, and the way to have that self-discipline is to have a strategy which gives a different way of choosing where to head.

What is more, the absence of a strategy to do something different does not mean nothing happens. It means, rather, that the party continues as it was before. Habits, procedures and bureaucracies continue to churn on, and where they are taking the party in the wrong direction, then they take the party even further from where it should be.

Given the party's current predicament that could well be a fatal form of inertia. Whilst the party's membership has been growing and council by-elections promising, the big round of elections in May 2016 showed only very limited progress. Progress, yes – which was a welcome change to the previous seven² years of local council decline. But progress at a rate at which it would take until 2044 at the 2016 rate of progress for the party to return to where it was before those seven years of decline³.

Parliamentary by-election results continued to be uninspiring – even holding the party's deposit far from guaranteed – until Witney and then, most spectacularly, Richmond Park in late 2016. Those two victories, however, reinforce the overall message of both this and the previous pamphlet about

¹ *Building a core vote for the Lib Dems: the 20% strategy* by David Howarth and Mark Pack:

<http://www.markpack.org.uk/building-a-core-vote-for-the-liberal-democrats-the-20-strategy/>

² The seven is worth emphasising as it predates coalition. As with Liberal Democrat membership, the long term trends were poor prior to May 2010. The proportion of councillors who are Liberal Democrat peaked in 1996. See <http://www.markpack.org.uk/137760/lib-dem-council-base/> for more details.

³ The 2044 calculation takes into account the different number of seats up for election each year.

how the party needs to change, for both successful outcomes were based on an approach much more in line with the pamphlets than with the party's previous approach to such campaigns – most notably in the heavy emphasis on Europe.

As for the party's national poll ratings, they have been only slightly better than broadly flat. The occasional scary dip to 5% has been replaced with the occasional hopeful rise into double figures but the rise has been barely greater than the noise of sampling errors.⁴ It is a rise too whose benefits will be imperilled by the forthcoming Parliamentary boundary changes which will make major changes to most, if not all but one⁵, constituency held by a Liberal Democrat MP.

Here then is a strategy for rebuilding the party. It is about priorities, structures, procedures and organisation rather than liberal vision and policies. Those are of course needed too, but there is only so much one pamphlet can cover – and through both the Agenda 2020 policy making process and the work of Your Liberal Britain, liberal vision and policies are being addressed. What this pamphlet instead looks to cover is the area that is being left worryingly unattended at the moment.

It sets out a future that would not be business as usual, but instead a future where we learn from both the successes and failures of the party's past, and the changed political circumstances of the present.

The way to do that is based on four pillars: building a larger core vote for the party, increasing our capacity to campaign, creating a more effective model for local party development and learning to innovate.

Read on to find out exactly how.

⁴ Taking a simple averaging of the polling figures each month, for example, the Lib Dem share hit a low of 6.5% in January 2016 and by July 2016 had recovered to 8.4%, still lower than it had been in 50 months of the 2010-15 coalition.

⁵ The ocean protects Orkney and Shetland from boundary changes.

A new approach for a new electoral landscape

You can't target like it is the 1990s anymore

Targeting brought huge benefits for the Liberal Democrats (and Alliance before it). First pioneered by Liberals in local elections, the rise in targeting at general elections meant that whilst 26% of the popular vote in 1983 produced just 23 MPs, in 1997 17% gave 46 MPs. Support down by over a third yet the number of MPs double. Then on to 2005, targeting's highpoint, where 22% gave 62 MPs.⁶

Moreover, targeting helped the wider growth of the party's strength. The increased profile and resources targeting brought funded a doubling of the size of the party's press operation. Broader popularity in the country meant that as targeted seats were won, others were brought into the targeting operation, seeing a doubling in the number of target Parliamentary seats too. Even in wider list PR elections introduced for Europe, London, Scotland and Wales, targeting worked, sort of. For recurring effort on a concentrated number of voters – rather than effort spread thinly with little effect on a large number of voters – repeatedly proved to be the best tactic for maximising the overall vote share and there were enough areas of strength for such concentrations of effort to produce a sequence of election victories.

But the picture now is very different. Consider what the next decade – through to, say, summer 2025 – holds:

- Two general elections (probably)
- Two London elections, including London-wide voting for the Assembly list and Mayor of London
- Two more rounds of Police and Crime Commissioner elections
- One or two Scottish Parliament and Welsh Assembly elections (depending on whether a four or five year election cycle ends up the norm), using list PR across large areas
- Nine rounds of council elections, two of which will use STV in Scotland
- 65 scheduled directly elected Mayor contests – a number likely to grow further
- An unknown number of Parliamentary by-elections, likely to be several dozen and almost all of which will be in areas of poor results in 2015
- Possibly one or more future sets of European Parliament elections
- Possibly one or more referendums (on European membership or Scottish independence)
- And council by-elections nearly every week

This smorgasbord of different elections highlights four major problems with the 2010-15 Parliament approach of trying to hunker down just in areas of strength.

First, there are not enough areas of strength left to do well even in traditional first past the post elections for Westminster and most town halls. Even on its own terms, the old approach no longer works.

But it is worse than that because, second, first past the post elections with relatively small geographic areas used to be pretty much the only way elections happened. Now they are but one part of a much more varied picture. The party's reduced areas of strength means hunkering down is

⁶ For more on the rise and fall of targeting's impact at general elections, see *The Liberal Democrat approach to campaigning: the history and debunking some myths*: <http://www.markpack.org.uk/66632/the-liberal-democrat-approach-to-campaigning-the-history-and-debunking-some-myths/>.

not enough to do adequately, or better, in those either. The party is less able to do well in the very sorts of elections which are now far more common.

Third, the result of leaving the first two problems to play out unchecked is that the party will simply get hammered again and again in elections. That demoralises members, demotivates donors, puts off the public and plays to the media's frequent view of the party as being irrelevant and not worthy of attention. Losing the deposit in a sequence of Parliamentary by-elections in weak areas ends up hitting the party in its attempts to win in stronger areas too. The party has been lucky that two Parliamentary by-elections in a row took place in areas where the party still had some organisation and echoes of support – and in the right order for momentum to build through Witney and on to Richmond Park. That was a lucky break – and it was exactly that, a lucky break. Recovery on a sustained basis cannot be contingent on hoping for the right lucky breaks to keep on coming up.

All the more so given that, fourth, the party is in a real battle to be even the third party in British politics. The rise of other parties, and the more recent Liberal Democrat troubles, means that third party status which formed part of the 1990s onwards successes is no longer the case. Other parties will crowd out the Liberal Democrats if the party just concedes large numbers of elections and types of elections to them. Doing badly in – or not bothering to contest - Police and Crime Commissioner elections is not just about those own contests in their own right. It also gives other parties a free chance to cement themselves as relevant, crowding out the Liberal Democrats.

We cannot regain that sense of being a major player, moving forward with a motivated team, if we keep on getting hammered or sitting out contests. Motivation and relevance come from building up step by step a series of successes, not from sitting on the side lines out of play.

Those four problems would be reason enough to need to move to a broad based approach to taking seriously fighting elections of all sorts in all parts of the country. But there is also a fifth motivation – that vision of community politics set out by Tim Farron in his March 2016 York conference speech. It is a vision of committed community campaigners bringing about change, helping trigger progress and hope. That is a vision for all communities, not just the eight which currently have Liberal Democrat MPs.

The answer to these problems is Targeting Plus, an approach based on four pillars.

Targeting Plus – the four pillars

Of course, first past the post – with the result that votes in some places count for more than votes elsewhere – still applies. Getting the 10 extra votes to take you over the winning line in one ward is better than one extra vote in 10 wards where we finish fourth.

It would be foolish, and quite possibly fatal, to assume that regardless of neglect, the party will somehow have any MPs after the next general election. Targeting is still crucial. But so too is doing more than just traditional targeting, to build up the party's wider capacity, to open (or re-open) up other areas to success and to compete successfully in the wide range of new sorts of elections.

Hence Targeting Plus, an approach which squares that circle and steers between naïve voices declaiming any benefits from targeting or fossilised voices claiming that ever narrower targeting is the route to success.

An approach too which recognises that much of what used to make Liberal Democrat campaigning so effective has since been copied by other parties. All parties in marginal seats now expect to keep active in between elections, to survey voters, to issue customised tabloid newspapers and to appeal to tactical voters. The eagerness of others to copy Liberal Democrat tactics may be a compliment, but it is also a compliment of the worst kind – as it undermines the value of the original.

Hence, many elements of Targeting Plus are as much about reinvigorating the Targeting part as creating the Plus part.

All of the elements are focused around four pillars: building a core vote, increasing capacity, a different model for local development and fostering innovation.

Four simple clear themes to have running through a complicated organisation in which so many have 'to do' lists which are so long as to be more 'will regret not getting round to do' lists. Deliberately, this pamphlet sets out many detailed ways to build each pillar. That detail is to illuminate what can be done. But the broader four principles will need holding on to as a clear focus through all of this. Otherwise, the fragmented nature of decision making in the party and the overload on many key people will fracture the plan into a semi-random selection of worthy decisions rather than the collective implementation of a clear strategy.

Pillar one: Building a core vote

Wander into the bar (alcoholic or coffee) at a Liberal Democrat conference and eavesdrop on a group of members talking. You will hear plenty of talk about policy. You will also hear plenty of talk about campaign mechanics. Policies for the health service or advice on the best supplier of window envelopes; take your pick.

What you will hear very little about, however, is political strategy and messaging. Local campaigners exchange Focus leaflets, not their different messages that got them safely through promoting a controversial council house building plan. Yet the smartest leaflet and the cheapest envelopes are naught without the right strategy and messages to communicate.

As David Howarth and I argued in our summer 2015 pamphlet, the Liberal Democrats need a larger set of long-term loyal supporters who help us through tough times and whose bolstered existence means we start much closer to the winning post in elections. Winning in first past the post contests will still usually require building a winning local coalition on top – but the bigger the core vote, the easier that is to do.

We saw too during the Westminster Coalition years the damage that is caused when the party's values get blurred. More hung Parliaments – in Westminster, Edinburgh and currently in Cardiff – all will repeatedly put that to the test again and again. For the very nature of securing political change in such circumstances involves making some compromises. Which is why we need to start from – and then maintain – a much clearer sense of what the party is about than many voters had.

To achieve the required greater clarity of what we stand for requires two sorts of message: first, a choice of messages which clearly demonstrate the party's values, such as on refugees, civil liberties or the environment. The Liberal Democrat recovery from the party's near death thanks to the fallout of the Liberal/SDP merger was fuelled by two issues that were not high up the list of voter priorities: campaigning for Hong Kong residents to be given UK passports ahead of the island's return to the Chinese and campaigning for vigorous international intervention in response to humanitarian catastrophes in former Yugoslavia. They worked, however, as a clear way of expressing the party's purpose and values.

But they came with a limit too due to that very peripheral nature. Which is why the Liberal Democrats now also need to find a distinctively liberal twist to the party's approach to the mainstream issues which dominate most voters' lists of concerns.

Recommendation #1:

The Campaigns and Communications Committee (CCC)⁷ should select approximately three⁸ campaign topics ('thematic campaigns') which

⁷ In this pamphlet I have used the current names for party committees. If the Governance Review's reforms go through, many will change their name and purpose. However in each case the recommendations easily map over into the new structures. For a guide to what the current committees are and some of the other relevant party jargon, see *A glossary of Liberal Democrat terms*: <http://www.markpack.org.uk/133262/glossary-of-liberal-democrat-terms/>.

⁸ Three is a good number to be concentrated enough to have a chance of making something meaningful out of the campaigns whilst still having the range to show more than just one side of the party. If there is a great campaigning topic which is not applicable across all of England, Scotland and Wales then some flexibility is of course required. However the party would lose many of the benefits of building a more coherent image for the party if the campaigns are completely different in each country.

clearly demonstrate the party's values, reviewing the selection normally on an annual basis.

It should be that the choice of such campaigns in part draws on grassroots inspiration and initiative, reacting to a successful local idea by making it one of the national priorities. Leaving it purely to self-selection would though miss out on the benefits of scale that come from the whole party joining a mutually supportive effort. Otherwise staff produce templates for one campaign, MPs give speeches on another and the local party does a campaign action day on a third. Far better for a democratically accountable party body to listen, think and coordinate efforts more smartly than that.⁹

Recommendation #2:

The Federal Policy Committee (FPC) should ensure that each consultation paper, policy paper, policy motion and manifesto for which it is responsible includes a section clearly laying out how the party's underlying beliefs have been applied to the topic, leading to distinctive recommendations.

Recommendation #3:

Other parts of the party which produce their own policy papers and manifestos – such as the Scottish and Welsh parties – should do likewise.

Of course, those recommendations are predicated on being clear about what the party's beliefs are. If there is a snap election in 2016, then the manifesto for that contest will provide a shared, democratically agreed document to do that. In the absence of a 2016 general election:

Recommendation #4:

The manifesto prepared for a snap election and the Agenda 2020 policy paper should be combined into a 'pre-manifesto' style document to be debated at the party's spring 2017 federal party conference.

When it comes to campaigning, activists need to be able to target messages accurately and effectively – and so:

Recommendation #5:

The party's market research operation should be geared around better understanding people who share Liberal Democrat values but who do not currently view themselves as Liberal Democrat voters – and how they can be won over.¹⁰

Recommendation #6:

Subject to any refinement from the above market research, the party

⁹ I toyed with the idea of saying members could vote on the selection or that a conference debate could be used. The difficulty with both those approaches is that the best set of campaigns are ones which together work well. Just like selecting a sports team, you need to think about how the different elements fit together rather than simply the merits of each individual person/campaign. That makes voting a rather poor selection tool due to the interdependencies between the choices.

¹⁰ This would be a significant departure from the party's usual approach to market research, which has either been based on testing a long list of different individual policies and/or identifying people who currently said they would seriously consider voting Liberal Democrat. Starting instead with people who share the party's values, and who may or may not currently consider themselves possible Lib Dem voters, is a much better route to identifying the policies and messages which will help build a durable core vote.

should take the modelling of the potential Liberal Democrat core vote in the Howarth/Pack pamphlet and create a scoring system in the party's electoral database, Connect, to allow local and regional campaigners to easily identify the best prospects for core voters.¹¹

Recommendation #7:

To enhance the modelling in the previous recommendation, the party should create a set of standard Connect questions for local campaigners to use which cover the most predictive pieces of information for determining the likelihood of someone being a potential core voter.¹²

One particular benefit of this approach is worth highlighting: it provides an insurance policy for popular candidates and MPs against a repeat of 1992 or 2015. It is no coincidence that the Liberal Democrats have done worst – such as in those two general elections – when there has been the greatest uncertainty on polling day as to who would be Prime Minister the following day. Likewise, it is no coincidence that the Liberal Democrats have done best – such as in the 2001 and 2005 general elections – when it has seemed all but certain who would be Prime Minister the day after polling day.

That is because the more settled the choice of Prime Minister has been, the easier it has been for Liberal Democrat MPs and candidates to get voters to focus on the question of who they want to be their MP, not their PM – opening the door for their local popularity and hard work to be turned into general election votes.

The Liberal Democrats cannot control whether or not future general elections will be close. A rebuilding strategy that was based on just hoping there won't be another close one until the party has had a chance to recover a long way would be foolishly risky – and would even then be merely putting off the day of reckoning until the party is strong enough to come out of it badly damaged rather than mortally wounded.

By contrast, building a stronger core vote gives another reason for people to vote Liberal Democrat even when a general election is close. It is a vital insurance policy for the party's future success.

¹¹ To summarise the key characteristics of potential core voters are that they are much more likely to hold a university degree, much more likely to be pro-European, are younger, are slightly more likely to use Facebook and Twitter, are marginally more likely to be women, are marginally more likely to be not white British, their incomes are marginally above average, they get their current affairs and politics news from different newspapers, they are much more prevalent in London and rather less prevalent in the West Midlands and they are much less likely to cite immigration as the most important issue facing the country and more likely to cite housing, the economy and the environment.

¹² Subject to further research to confirm this, it is likely that only two questions are needed to have a strong predictive power: *Did you vote for the UK to remain in the European Union?* and *At what age did you leave full-time education?* The simplicity of only two questions makes this approach easily adaptable to all forms of campaigning, from doorstep to the internet and from local to national.

Running thematic campaigns

A committee making a decision is not the same as taking action. That is why the CCC picking campaign topics (Recommendation #1) is not enough in itself. There also need to be meaningful campaigns behind them. Meaningful because there is more to a campaign than one press release, an online petition page and a couple of leaflet templates.

The so-called national campaigns run in the past have usually suffered from being badly scoped and under-resourced. Instead, the party should learn from how pressure groups and other campaigning organisations run effective national campaigns which generate publicity, grow the organisation – and achieve meaningful change.

The basic starting point of good campaigning in the world outside political parties includes identifying achievable goals which a campaign can hope to achieve. Yet Liberal Democrat national ‘campaigns’ have traditionally been about simply expressing a political viewpoint, rather than built around specific policy wins and the relevant dates in the year for them. Most painfully obviously, national ‘campaigning’ for tax changes during the last Parliament used to peak in April/May (ahead of the May elections) – but therefore also just *after* the point at which they could have actually achieved something by influencing Budget decisions.¹³

To make the missed opportunities even greater, this form of Liberal Democrat campaigning has been insular – looking simply at using Liberal Democrat resources to promote the Liberal Democrat point of view. The alternative is to build a wider coalition of supporters for each campaign, which increases its chances of success and helps the party reach out to new organisations, communities and people.

It is a ‘networked campaigns’ approach that the party needs. Such campaigns “are typically led by a central body that frames the issues and coordinates energies towards shared milestones but also leaves a fair amount of freedom and agency to grassroots supporters and a diverse network of inside and cross movement allies”.¹⁴

Recommendation #8:

For each of the campaign topics which the CCC identifies, it should also ensure a campaign plan is drawn up which covers the intermediate and final changes the campaign seeks to achieve; how the campaign will help communicate the party’s values; the ways in which the campaign will be used to increase the party’s capacity; and how the campaign will be used to reach out to sympathetic people on the issue outside the party.

Or in short, for each campaign the CCC should ensure there is the sort of campaign plan that is almost completely absent in the Liberal Democrats and completely the norm outside the Liberal Democrats.

The idea of the CCC overseeing the drawing up of campaign plans raises an important point about capacity. If this becomes simply another demand on HQ staff to produce paperwork for committee

¹³ By contrast, in the days of the Liberal Party Archy Kirkwood MP’s campaigning for Freedom of Information legislation married up a series of Private Members’ Bills with national campaigning – working with allies both from across the political spectrum and outside of party politics. The result was small but significant changes in the law in the short run and the terms of debate shifted for bigger success in the long run.

¹⁴ This definition is taken from *Networked Change* by Jason Mogus and Tom Lucas: <http://netchange.co/report>. See also *Networked Campaigns – a winning approach?* by Tom Baker: <http://thoughtfulcampaigner.org/networked-campaign-and-winning/>.

meetings, it will fall into the same under-resourcing issues which have sunk occasional good intentions for genuine campaigning in the past.

Yet such campaign running skills are not unique to party HQ. Indeed, it is not unfair to say that most of these skills in the party rest outside HQ – in particular with the many party members who run campaigns as part of their day job for all sorts of other organisations. Yet just as local parties with staff demonstrate, political campaign planning can be done by a mix of volunteers and staff.

Recommendation #9:

For each campaign topic, a small campaign coordination taskforce should be appointed by CCC. Its membership should ensure sufficient representation of different party stakeholders, but the predominant emphasis should be on a membership that has relevant campaign expertise.

Creating such thematic campaigns also provides an opportunity for the long-talked about improved integration between the party's campaigning and policy processes.

Recommendation #10:

The Federal Policy Committee (FPC) should set up a policy panel to mirror each thematic campaign. The remit of the panel should be to enable policy debate and discussion around the theme within the party, to manage outreach to relevant policy experts outside the party and to ensure that sufficiently detailed policy is available to support each thematic campaign.

Successfully catalysing, mobilising and encouraging all the thematic campaign tasks set out in this section is not a minor task. There is currently no obvious post holder to help make this happen. Or rather, all the possible post holders are already very busy with other work (and will be all the more so if the other recommendations in this pamphlet are followed). However, a new post is about to be created by the party which provides the solution to this bottleneck.

Recommendation #11:

The party's autumn 2016 federal conference should go ahead with creating the post of elected Deputy Leader, and part of the new role's remit should be to oversee the party's thematic campaigning.

There are promising signs of a different approach to campaigning, and one in tune with the ideas in this section, from the party's new Director of Campaigns, Shaun Roberts. In a message to party members set out in the September edition of *Ad Lib*, he wrote that he wants, "Campaigns that show our identity and deliver change".¹⁵

Note that "deliver change". He comes to his new role from to his role from *Which?*, bringing a great understanding of how successful campaigning organisations need to pick campaigns which demonstrate step by step changes to the world. That is the way you keep people motivated, build a larger team and generate momentum.

Promising signs, but ones that without the changes set out here will die away.

¹⁵ For the full message, see *Major change in Lib Dem campaigning approach set out by new Director of Campaigns*: <http://www.markpack.org.uk/142780/shaun-roberts-priorities/>

The power of competence

Alongside clearly communicating the party's values, the party needs to demonstrate its competence. That is so important because 'valence' issues dominate political choice in modern British elections.

'Valence' is the technical term political scientists use to describe issues where pretty much everyone agrees on the desired outcome and the choice between parties is over who best can achieve that outcome. Cutting unemployment is an example of a valence issue – all but everyone is in favour of lower unemployment and so voters make choices based on who they think is most competent at achieving it.

There are certainly some areas of non-valence choice – such as over immigration or Europe – and those are particularly important to building up a larger Liberal Democrat core vote. But as the research and data shows, perceived competence is vital.

It is also different from much political messaging for a party in opposition. If you are in opposition you can usually only talk about what you would do on different policy issues, rather than be able to actually do them. With competence, however, you can demonstrate that you are competent or not both in and out of power.

In that sense, the myriad of different incoming communications to the party at all levels every day is the front line – how they are handled tells people day by day how competent, or not, we collectively are as an organisation.

Recommendation #12:

The party should review the different casework and correspondence support systems available with a view to rolling out a comprehensive package to empower people at all levels, from would-be councillor through to peer, to handle correspondence efficiently and promptly.

So too with what the party puts out. Including bar charts. I am a great fan of bar charts. Done well, they are an effective campaign tool.¹⁶ I am quite happy for any reader to take any bar chart I have been responsible for and inspect it closely, ruler to hand.

I also know that readers do not have to look very widely to find Liberal Democrat bar charts which do not even need a close look to crumble. Yet the range of legitimate different sources you can call on to make an effective case do not require abandoning a literal sense of proportion. There is always scope for legitimate debate over whether, for example, the previous general election or a more recent by-election is the best comparator, and just as in a court of law, it doesn't mean that one side or the other is being dishonest if the advocates on each side point to different evidence.

Which is why when it comes to demonstrating competence, the party needs to be much stricter about reigning in the freelancers (and even staff) who think that proportions are for ignoring. That starts with the party's own official output from staff – which is of course amenable to more direct control in the way that volunteers around the country are not, and require longer-term cultural change.

¹⁶ For evidence, see *Bar charts: three things to remember about their power:* <http://www.markpack.org.uk/95284/bar-charts-three-things-remember-power/>.

There is more to this than bar charts as other aspects of literature design – such as the inclusion of footnotes to source factual claims in direct mail or emails – can also reinforce credibility and competence.

Recommendation #13:

The Director of Campaigns & Elections should be held accountable for ensuring that the federal party's campaign outputs and templates, including bar charts, promote the party's reputation as a competent organisation.

Recommendation #14:

ALDC should revamp its literature templates and training sessions to encourage a greater focus on accuracy and demonstrated credibility in literature..

Alongside bar charts, another high profile express of the party's competence – or not – is how it handles high profile disciplinary cases. Despite the improvements introduced following the Morrissey Review¹⁷, this is still very much a work in progress.

Moreover, the Morrissey review's remit was – rightly in the circumstances – focused on one particular set of concerns over whether disciplinary processes are competently run. It did not, for example, touch on the training of Returning Officers or the rules which they supervise. Yet the conduct of party selections is often the trigger for complaints about party processes which spill over into publicity questioning the party's competence.

Recommendation #15:

The Federal Executive (FE) should commission a review into the party's disciplinary, compliance and internal (s)election processes to identify any reforms that would improve or protect the party's reputation for competence. (Other aspects of these processes which do not touch on this issue would be outside the review's scope.)

Most problematic in this respect is the question of who can take the Liberal Democrat whip in different elected bodies. As controversies over both different members of the House of Lords and over council group membership have shown, it is quite possible for the party's disciplinary and whip processes to be out of step thanks to them being driven by different processes and people without any required linkage. A council group, for example, is free to even continue to offer the Liberal Democrat whip to a party member who has been expelled.¹⁸

Any resolution of this unsatisfactory situation requires first for the party's disciplinary procedures to be improved, which is why the following recommendations should only come after the Governance Review has concluded its work.

Recommendation #16:

The federal constitution should be amended to require anyone in receipt of the Liberal Democrat whip at any level of elected office to be a

¹⁷ A full copy of the review report is at <http://www.markpack.org.uk/43553/helena-morrisseys-report-into-liberal-democrat-culture-and-processes/>.

¹⁸ The fact that in such circumstances someone might in turn move for the expulsion of the Leader and Chief Whip for them in turn bringing the party into disrepute just shows how messy things can get.

member of the Liberal Democrats who is currently neither suspended nor expelled. Provision should be included for a 'grace' period for anyone switching parties to acquire Liberal Democrat membership.

For some – especially in the House of Lords – the idea that the outside party can set conditions for receipt of the Liberal Democrat whip may raise hackles. However, we are talking here about the **Liberal Democrat** whip, not just a private arrangement amongst an independent group of people. The use of the party's name for such arrangements is something that should only be carried out with the consent of the wider party, just as anyone seeking to use the party's name on the ballot paper in an election can only do so with the consent of the wider party.

Pillar two: Increasing capacity

Despite some nods in the direction of increasing capacity in the recommendations so far, the net effect of this pamphlet up till now has been to call for more to be done. Which is why it is time to focus on capacity specifically.

Increasing the party's capacity to campaign would always be welcome, but it is particularly important given the current circumstances.

The party's local government base – and the capacity that comes with that – had already been shrinking for several years before the party entered in to coalition in 2010. Add to that what happened since 2010 and the scale of the challenge is formidable. Especially when the pieces of good news on capacity are sized up against the challenge.

The party's fundraising did remarkably well during 2010-15. It was a strong performance compared to previous Parliaments which, given the much lower level of support for the party, made the performance near-miraculous. And yet the party was still massively outspent by rivals in the 2015 general election and is also massively out spent week in, week out in the ordinary course of politics.

Likewise, the huge growth in party membership since 10pm on general election night – repeated after the European referendum and accompanied by securing a much higher renewal rate than is usual for new members - is very welcome. As with fundraising, this is down in no small part to the achievements of a small number of overworked staff. And as with the fundraising, it still leaves the party smaller and weaker than its main rivals.

Nor has it fed through to a significant growth – at least yet – in the party's ability to fight elections. There was no huge surge in the proportion of wards contested by the Liberal Democrats in May 2016, for example. Those May 2016 figures repay some attention because they show not only how much more progress is needed, but also how it is quite doable.

In England in the 2011, 2012, 2013 and 2014 rounds of local elections, the Liberal Democrats averaged 74% of the number of candidates that Labour and the Tories put up. In 2016 this had not improved. In fact, the figure was noticeably worse at 67%.

Yet it would have 'only' taken 200 extra local council candidates to be up at 75% and in some sense back on the right track to recovery. Given the huge growth in the party's membership, it is not hard to believe that 200 extra candidates would have been achievable, had there been a serious commitment through the party to see a recovery in its ability to contest local elections.

So how to do this?

Improving diversity

There are many reasons why effective action to improve diversity is desirable. In the context of this pamphlet, two particular ones apply. First, the chunk of the electorate which shares the party's values is significantly more diverse than the party currently is (see p.9). Yet do a Google image search of "Lib Dem activists" and see what impression of the party comes up: a reasonable smattering of female faces in amongst the male faces, but an almost solid wall of white, able-bodied faces.

To build a core vote we have to feel familiar to our (would-be) core voters and to understand them so that we can better convert them to Liberal Democracy. That comes in part from reflecting them in our own make-up. The more we are like the people we wish to appeal to, the more effective our appeal will be.

Second, and the reason for locating diversity in this section of the pamphlet, because improving the party's diversity is also about increasing the party's capacity. That is both because the evidence shows that more diverse organisations are also more successful due to better decision making,¹⁹ and also because better diversity is about unlocking currently neglected party skills and time.

Even taken as given the party's current membership make-up, for many diversity strands²⁰ the party under-performs on the proportion of activists, candidates, office holders and elected politicians. Yet the party is also short of talented, keen people to fill all those roles – which means the under-representation of parts of our membership in those roles comes with a cost as it shows we are failing to fully tap the potential amongst our membership.

The clearest example of this comes with gender as data on the male/female balance across all those criteria is the most readily available. Liberal Democrat membership is 40-50% female²¹, but the data from 2015²² shows that only 26% of Parliamentary candidates were female, 35% of English regional conference representatives, 26% of local party officers and 34% of council candidates.

The last figure is the most telling as it is often a struggle for local parties to find a full slate of candidates. Being better at diversity is – in addition to all the other perspectives – a direct solution to the party's need for more people to do things.

How then to make this happen? Part of it is about being aware of the state of play, especially for those aspects of diversity away from gender and Westminster selections. The frequent focus on gender is understandable given women are in fact the majority of the population – an under-represented majority rather than an under-represented minority – and given also that the data for them is often the easiest to compile. It is a focus, however, which risks being at the expense of other under-represented groups, rather than being a way of highlighting a wider problem.

Likewise with Westminster selections. They too grab attention for understandable reasons. But the attention they get also risks overshadowing the importance of improving diversity in other areas of

¹⁹ And even better candidates: see <http://www.markpack.org.uk/137477/academics-say-impact-women-shortlists-quality-candidates/>.

²⁰ In almost all cases, following the legal definitions set out in the Equality Act makes sense as they provide both clarity of definition (important when rules are made which require judgements about whether someone falls into a particular category or not) and also this Act sets key thresholds and processes which make some of the more radical action to improve diversity legal.

²¹ See <http://www.markpack.org.uk/122620/lib-dem-membership-gender-balance/>.

²² Details in <http://www.markpack.org.uk/133884/whats-the-state-of-the-liberal-democrat-finances-and-how-is-the-party-governed/> and <http://www.markpack.org.uk/135820/lib-dem-local-council-gender-balance/>.

the party's activity - especially those which are more directly under the party's control than the outcome of elections that take place only every four or five years. Council elections happen every year. Local party officer make-ups are wholly within the party's control. Areas such as these are all easier ones to make progress in, as long as they are not neglected because attention is too concentrated elsewhere.

Recommendation #17:

As part of the annual reports to autumn conference, diversity figures (based, where required for practical reasons, on surveys) across all diversity strands should be reported across a wide range of party posts, including approved Parliamentary candidates, council candidates in the May round of elections and local party officers.

In addition to better data and awareness, the party can and should apply to itself the sort of action it recommends for others. During the 2010-15 Coalition, the party pushed for 'name blind' applications to be introduced in the public sector, thanks to the evidence that even when there are subsequent interviews, having an initial name-blind process successfully removes some types of bias from the overall application process.²³

Recommendation #18:

*The party should introduce 'name blind' recruitment for the pre-interview stage when party employees are being hired.*²⁴

A further area where the party can, and should, take action is how the party's internal election and selection rules do or do not promote diversity. This is not an area for easy solutions as there are many conflicting pressures.

Longer campaigns cost more, and that plausibly hinders socio-economic diversity. (The actual systematic evidence on this is mostly missing, but the theory is certainly plausible.) Yet shorter selection campaigns, for example, consistently heavily favour incumbents - and given the party's current record on diversity - that means all favour an unwelcome status quo. Moreover, longer and more costly campaigns can better test out the sorts of skills the party needs from those who win - and practical testing of skills is important because anyone can claim to be good at anything in a hustings speech or manifesto leaflet. More intense selection campaigns also give voters more information, which usually leads to better decision making.

Here, therefore, is how to improve diversity in the party's selection rules:

Recommendation #19:

A 'diversity fund' should be created along the lines of the one trialled in London to which anyone can donate and which then makes grants to

²³ For more on this, see *Clegg signals success for Lynne Featherstone's name-blind employment campaign*: <http://www.markpack.org.uk/20252/clegg-signals-success-for-lynne-featherstone%e2%80%99s-name-blind-employment-campaign/>

²⁴ There is a practical difficulty in that in a relatively small community it can often be possible to identify who someone is from details provided. For example, an employment application from a previous Parliamentary candidate who is now leader of a Liberal Democrat-run council would immediately be identifiable as one of only a very small number of individuals. Such practical difficulties make name-blind shortlisting in candidate approval processes the worst of all worlds as they would be sort-of-but-not-really anonymous, opening up the door for far more bias and controversy. However for applications for paid-employment, the number of identifiable relevant party details is significantly less.

candidates from under-represented groups who would otherwise struggle with selection costs.

Recommendation #20:

A maximum donation limit should be introduced for selection campaigns so that rich candidates cannot simply self-fund but also have to demonstrate fundraising ability.

Recommendation #21:

Party selection rules should be changed so that candidates cannot be charged for entrance to party events during selections in order to help level the playing field between candidates of different incomes.

One final area is worth exploring further: the information provided to party members as they vote in party selections and internal elections. Sometimes this includes information about the posts up for election. Sometimes it includes information about the criteria the relevant party body has decided are relevant to the selection, such as the key skills that were set out to applicants and used in any shortlisting process. Only very rarely, however, does such information try to tackle discrimination.

Recommendation #22:

A review should be carried out of best-practice diversity measures used in other organisations to minimise the risk of bias at the time of voting / selection, with a set of recommended approaches then set out for use at all levels of the party.

A smart use of incentives

The very successful financial incentive schemes to get local parties focused on recruiting and renewing members have shown that, whatever the party thinks of using money as a carrot or stick to improve public services, it works internally.

These schemes work by having trigger levels for local parties to receive a share of people's membership subscriptions, such as triggering payments if membership rises (rather than falls) in a quarter. These schemes have also recently regularly been 'under threat', which not only undermines their impact but also positively impedes longer-term planning by local parties which can rely on income from membership to fund activities.

Recommendation #23:

Make a commitment to continue the membership financial incentive scheme throughout this current Parliament, providing local parties with the clear long-term framework to make membership work a central part of their activity and to provide them with a secure income stream to fund expansion of their activity.

Recommendation #24:

Add a second condition in addition to membership numbers for triggering the quarterly payments: that payments will only be made if every council by-election has been contested in that quarter and, for the May round of elections, that the proportion of seats contested was equal or greater to the proportion contested the last time those seats were up for election.

The combination of a long-term commitment and new trigger conditions make accurate forecasting of the likely payouts harder. Therefore, this combination should be budgeted for at the federal party level, with an increase in the federal levy (the share of the membership subscriptions that goes to the federal party) to pay for it. This could be combined with the changes set out in the section *Making it easier for people to get re(started)* (see below) to increase the campaigning tools free at the point of use for local parties, also via changes to the federal levy.

In practice, this would mean a shift in financial resources to the grassroots, which would be a welcome shift because doing extra membership work and fighting more elections does not come for free. Well-run Liberal Democrat councils have frequently – and rightly – eulogised the virtues of focusing resources on key frontline, grassroots services. That logic is a sound one to apply also to the party's own budgeting.

The collective voice of local parties in such budget discussions is usually very weak. Other layers of the party have a clearer collective voice and it is no coincidence that they are therefore frequently much more effective at fighting for their slice of the pie.

People defending their own immediate interests is understandable, but in this case they should not be allowed to win out. Incentivising the rebuilding of the party at the grassroots, and funnelling more financial resources to do that – is in everyone's interest not merely in the long-run (a larger party means a large pie to slice up) but also in the short-run because having more members and more candidates is what everyone should be welcoming.

Sharing, not hoarding, data

Increasing capacity is not only about acquiring new resources. It is also about making better use of existing resources. Better sharing of data within the party offers the opportunity to increase the resources (data) available to different people in the party carrying out different tasks who currently are cut off from some of the relevant data due to systems, procedures and habits.

How far do you think this conference motion would get:

Conference believes it is wrong for local, regional or state parties to make use of data gathered via petitions run online by the federal party.

Conference therefore calls on party HQ to ensure that data from such petitions is never entered into the party's shared electoral database.

Or how about this motion:

If a party member dies, conference believes their family should have to contact all the different parts of the party separately in order to remove their email address from mailing lists.

Conference therefore calls on local parties to maintain their own email lists for members completely separately in order to ensure that a dead member removed from the federal party's lists does not accidentally get subsequently removed from their lists too.

Absurd of course – and yet also in their impact really no different from how many in the party often choose to act. When the federal party runs an online petition which does not ask for address or postcode, it is in effect acting as if the first motion had taken place. Nor are volunteers around the country immune from this data isolation, as attested by the distressing trickle of requests from distraught members or relatives of members that hit my inbox after they have found that reporting a death once is not enough.

The cause of this data fragmentation is threefold:

- systems that do not work together as well as they could;
- internal rules and processes which often fail to value improving and sharing data; and
- an absence of leadership in setting a culture whereby the value of sharing data and the skills required to do so are spread within the party.

If you really want to look after and share data well, the first two problems become just that – problems you work around. But in the absence of such a determined culture, instead they become excuses. Tackling both the first two will be useful, but the real desire has to be there too.

The prize is great. Not only increasing the party's resources by unlocking data. Not only reducing the error and overhead of repeatedly maintaining the same information in quite so many different places. But also being able to say with a clear conscience 'we really do have a system which means we only need to be told someone has passed away once'.²⁵

²⁵ The legal issues around sharing data within the party are fairly straightforward, and indeed require the party to be good at internal data sharing. This is because the party has one overall data protection registration, which to put it simply both makes it legal for the party to share internally and also requires it – because there is a legal requirement for best efforts to be made to ensure that the data used is accurate.

Or, more positively, this is about introducing a culture whereby everyone handling party data thinks before deciding on systems and processes, ‘how quickly would this data get into the hands of a new member fighting a council by-election later this month?’.

Recommendation #25:

The federal and state parties should commission a joint data working party to review all the different data sets held at federal or state levels (from online databases through to ad hoc spreadsheets), and produce an action plan for increasing the number which are shared.

Recommendation #26:

The party should open up use of the Connect database API²⁶ to vetted party organisations and external suppliers in order to allow them to build improved data handling systems.

Sporadic, and sometimes successful in their own small ways, efforts to consolidate party data into a smaller number of shared systems have taken place in the past. One area in particular has been almost completely neglected: party bodies. Many different groups of people maintain lists overwhelmingly, if not completely, made up of party members – yet each having to maintain their own list fully separately, and when a member changes any contact details, numerous different people therefore have to spend time updating their own isolated records. Not to mention the hassle for the member too having to tell lots of different people about the change. Hence...

Recommendation #27:

Run a trial of opening up the party’s membership system to party bodies such Associations Organisations (AOs) and Specified Associated Organisations (SAOs)²⁷ to allow them to maintain their data through one shared system, rather than duplicating records in separate systems.

It is not only party bodies who end up creating their own overlapping datasets. So too do the (s)election campaigns for internal party contests in those where the rules mean they have access to membership data. Campaigners in such contests frequently find updates to the data, such as identifying that a phone number is no longer working, but only rarely does that data get back into the system which others use. Instead of one person discovering a phone number does not work and saving time for others, different people have to all independently discover the same error.

Recommendation #28:

Federal and state selection and internal party election rules should be changed to require candidates in those contests where they are given party membership data to accurately record any corrections in such data they encounter during the campaign and then to report back those corrections at the end of the contest.

²⁶ This is the interface which lets external programs talk to the Connect database and, for example, update it with data gathered through a website survey.

²⁷ These are a party bodies which meets particular requirements and so are considered an official party body with some limited extra rights that go with that. An SAO is a notch above an AO.

But more than simply acquiring data can be done. People can also be positively encouraged to boost the party's membership work by encouraging candidates to re-recruit lapsed members²⁸ to the party during contests:

Recommendation #29:

Federal and state selection and internal party election rules should be changed so that in those contests where candidates are given party membership data, they are also given lists of lapsed members ahead of the renewal deadline for voting in that contest.²⁹

One recommendation, you may notice, is missing. Although moves are suggested to reduce the amount of duplicate sharing of the same data about the same people in different systems, there is no recommendation to have one magic single database to power membership, campaigning and digital activity all in one. That is because even the Obama campaign in 2012, with all its mammoth budget and star roster of digital talent, did not find the 'one database to rule them all' approach sensible. There are so many different specialist uses for data that trying to pile everything into one system does not work. Instead, the trick is to share data – automatically where possible – better.

Good data is shared data.

²⁸ The focus on lapsed members is deliberate as this provides a protection against problems of entryism and the like if rules are otherwise relaxed for anyone.

²⁹ In theory, this was done at my prompting for the last Liberal Democrat leadership contest. However, I have not been able to find anyone in either leadership camp who recalls actually having been given the data.

Rediscovering the purpose of Focus leaflets

The original motivation behind the multiple invention of the 'Focus' local newsletter³⁰ has a familiar ring. In the absence of media being willing to pay attention to, and report on to the wider public, what the then Liberal Party was up to, Focus newsletters were a way for party campaigners to do so directly.

That problem of lack of media interest is very much with the Liberal Democrats once again. It is also worse because the reach of local newspapers has declined whilst healthier media – such as local radio and regional TV – rarely pays much attention to local politics. Unless, for example, a council triggers farce or tragedy – sending a poll card to a cat or being accused of negligence in the death of a child in care – its actions are rarely reported on by the media consumed by most people. All the more so for a party in opposition on the council or a candidate hoping to win a Parliamentary or other seat.

Focus is still a good solution to a relevant problem. Good, but not quite as good as it used to be. For it too has seen changing circumstances that undermines its reach. The idea of one publicly accessible letterbox per household has seriously frayed, thanks to the increasing number of properties which lock away their letterboxes behind intercoms or even do not have one – and thanks also to the increasing number of unconnected people who share a letterbox, such as multiple tenants behind one front door. The letterboxes which can be reached are also frequently filled with marketing material of other sorts, resulting in many people assuming that pretty much whatever comes through their letterbox will be uninteresting to them.

As a result, the modern version of Focus needs to come in two forms. The paper-based version which is designed and scheduled with a deliberate audience building mentality in mind. (Clue: a once a year lecture on party policy is not a form of newsletter that will build a regular readership.)

Then also there is the opportunity through the internet to build a regular audience, whether that is through email, blogging or social media. An increasing number of Liberal Democrat councillors, for example, have readerships in their wards for regular email newsletters which reach more people than they need votes to win. Of course not every reader will vote for them, but it is a good yardstick as to whether a genuinely mass audience of the scale relevant to win elections is being reached.

Common to both paper and electronic versions of a modern Focus should be an editorial mind set about regular publication, readership growth and content which is not only relevant but also interesting. The logic, of course, applies not only to local party communications but to national ones too.

Recommendation #30:

The federal party should commit to running a monthly email newsletter for the public, building the party's direct national audience and featuring its thematic campaigns (see Recommendation #1:). In addition, stories within it should be made readily available in suitable formats for other parts of the party to easily reuse in their own publications.

Recommendation #31:

The party should commission from ALDC the production of six Focus

³⁰ There was no one moment of invention. Rather the same idea, using several different names, emerged in multiple places independently. See *Coming into Focus: The Transformation of the Liberal Party 1945-64* by Mark Egan.

newsletters a year (in English, Scottish and Welsh editions). The newsletters should be made available via a print-on-demand service which lets local individual members directly buy copies to distribute in their own streets and also allows local campaigners and local parties to vary as many or as few stories as they wish.

This last recommendation would bring multiple benefits which fit with other parts of this rebuilding plan. It would give keen members in areas with weak or non-existent organisation a way to be regularly active. It would give local parties an easy route from doing no leaflets outside of election time through to doing regular localised leaflets by ramping up the number and degree of localisations over time. It would also give the party overall a powerful way of ensuring that its thematic campaigns actually get mentioned in grassroots campaigning – powerful because it would be based on making things easier for grassroots members rather than trying to order them to do things.

It is a recommendation that is radically different from the party's current way of doing things. But reflect on what the current way of doing things means for a new member wanting to get something going in a derelict area. Buy PagePlus. Learn PagePlus. Pay up to join ALDC to get access to its (excellent) templates. Find a printer. It is an awful lot to learn, spanning many different skills. Why put all those obstacles in the way when instead modern on demand printing can leave local people in control of what the leaflet says, yet also allow them to easily scale from buying off the shelf through to fully customised? This way all you need do is make your first purchase to get going.

Making it easier for people to get (re)started

The note on which the last section ended hints towards a more fundamental point. We must make it easier for people to get started as campaigners. People should have quick and direct access to the tools and support they need rather than being faced with a steep learning and financial curve. There is more than enough for newcomers – whether new members or old members trying to get things going (again) in an area – without the party’s way of doing things adding in extra burdens.

A genuine commitment to easy access would make for a radically different approach to party organisation.

Our key database (Connect)? That is locked away behind not only monthly charges but what’s more monthly charges you have to get a bureaucracy – even if it is a nice friendly local party executive, that is still a bureaucracy – to agree to meet. Great election winning templates for local campaigns? Pony up and pay your ALDC membership subscriptions first please. Access to great training? That’ll be a conference registration fee first please.

If you are in the know you can shimmy round many of the obstacles. Know who to ring to get to come to do a free training session. Know who to email to be sent some leaflet designs you can reuse. That all cloaks in a comfortable disguise what is missing, what is hard and what is costly in the way the party is set up when it comes to getting activity going from scratch or a low base – the sort of low base that is the current base in huge parts of the country. And what is mystifying, unknown and costly when you are a new member – which nearly half the party’s members are – rather than one with years of accumulated knowledge.

That needs to be fixed, and it can be fixed. It needs a focus on making things simple and free.

Much simplicity comes from the previous section. Implement those recommendations and being up and running with regular communications, gradually ramping up the local content, is straight forward.

Simplicity should also be worked into more of the party’s campaign systems. The increasing use of MiniVAN is a great example of how progress can be made: create an IT system that makes a key task simpler and more efficient. The canvasser just needs to know how to use an app (an increasingly normal expertise) while no-one in the local party has to spend time entering data any more.

Take a step away from the front line, however, and not much has been made significantly simpler in the last few years. If anything, things have got worse due to the proliferation of channels. How do you integrate email, SMS, telephoning, door knocking, leafleting and direct mail into a sensible get out the vote (GOTV) campaign, for example? That is the sort of multi-channel marketing operation for which it is increasingly the norm in the outside world to have integrated systems. For the Lib Dems, it requires lots of time, a far greater attention to detail than many have, multiple spreadsheet downloads and a fair degree of good fortune that no mistakes are made.

Recommendation #32:

‘Hack days’ should be organised to tap volunteer digital expertise, concentrating on expanding the range of apps and services which simplify tasks such as running a GOTV campaign across multiple channels or following up canvassing with prompt personalised direct mail and email.

Benefits will flow too from making more of the party’s resources free at the point of use. What can be a problem for public services should be a boon for the party. Providing health care free at the

point of use is a good parallel. This brings many benefits and a significant downside – increasing demand on the services such that some other form of control, whether it is queuing, regulation or, most controversially, price is required.

For the Liberal Democrats, however, increasing usage of services through making them free at the point of use would be a boon. Imagine if the database trio of Connect, Nationbuilder and Salesforce were all free at the point of use for local parties.³¹ That would encourage more data gathering, more online campaigning and better tending of vital membership records.

Spreading and increasing usage should be encourage, not taxed.

Moving to such a free at the point of use services requires two elements. First, there needs to be widespread buy-in within the party as to which suppliers should be providing these services (particularly for websites where there are a range of options). Second, it requires the sums to add up.

Recommendation #33:

The Federal Executive should organise a working group to consult, review and decide on the core technology recommendations to be provided free at the point of use for campaigners.

Recommendation #34:

The proportion of party membership subscriptions which goes to the federal party (the federal levy) should be increased in order to centrally fund these services. In turn, the federal party would drop its current charging for access to them.

The benefits would be significant, especially in supporting campaigning in areas which are currently sporadic or absent in their use of such tools. Ensuring complete Connect coverage, for example, would mean that all campaigning, anywhere in the country, can contribute to the party's shared data for use in subsequent elections carried out over larger areas.

Similarly, a free high quality web campaigning toolset would enable more widespread campaigning, this time of a digital sort, in just the way that the spread of laser printers and desk top publishing software did in their own turn by putting tools directly in the hands of far more people.

One final benefit from more widespread usage of such tools: the more people who use them, the more good ideas will be generated on how to improve them and the more volunteers who will be inspired to build further tools and processes to work with them.

³¹ Connect and Nationbuilder directly require subscriptions from local parties. Salesforces comes with a very limited number of free logins. The alternative to Nationbuilder which some local parties prefer, the Prater Raines website service, is also paid-for at the point of use. A deal to have basic Prater Raines sites to cover parts of the country without their own local Liberal Democrat website was successfully struck when I worked at party HQ but it has long since been discontinued. It still, however, acts as a good model of how central provision, free for local parties, can help weaker areas get on the road to strength.

Pillar three: A different model for local development

There is more to building up the strength of the party's grassroots campaigning capacity than members and candidates. This is why finding a way to move away from the current restrictive, even counter-productive, development model is also necessary.

At its plainest, the party's current blueprint for building up a weak area is:

1. Find at least one person who wants to be a councillor,
2. Concentrate activity on a council ward and win it,
3. Repeat (1) and (2) until a sizeable council base exists,
4. Find someone who wants to be an MP,
5. Raise money to employ a campaign organiser, and
6. Have candidate and staffer run general election campaigns until they win, collapse with exhaustion or both.

It is a model that has often served the party well in the past. It is also one with several deep weaknesses.

Once you have at least one person who wants to be a councillor, and council elections in the not too distant future, concentrating in on winning that council seat makes a lot of sense. But often weak local parties do not immediately have someone who is very keen on becoming a councillor. Or they cover a very large areas and that one person is at one end, dozens of miles and not inconsiderable travel time away from where many of the members live. Or the next council elections are three or four years away.

All of those factors add up to people often stumbling at the first stage and never really getting going with developing. Not enough happens because there are not yet enough people really serious about wanting to stand for council. Instead, the party needs a development route which works even if you do not yet have such people, or have them at one end of the local party but need to keep things going through the rest of the area too.

What is more, it also needs a model that works where the local party itself isn't that functional, whether that is due to shortage, insularity or incompetence of activists. And it needs a model which can cope with the strain of trying not just to win a council ward but a whole constituency.

That is why the next three sections set out how to improve and supplement this model: how to give individual members more ways to get involved, how to give local parties an alternative development route until they can get stuck into winning council wards and how to deal with the collapse from exhaustion problem at the final stage.

The “local party of last resort”

Take the example of a local party member I recently spoke to, who I will call Abraham. He joined the party after the 2015 local election. His local party is weak but functioning, with a Liberal Democrat councillor holding a ward near where he lives. The councillor is pretty good at welcoming new members, calling on them in person. What’s more, it organises collective campaigning sessions – a great way to get people involved and make them feel welcome. So far, so good. But where it went wrong for Abraham is that those collective sessions are on a weekend morning when family commitments rule him out from helping – and the local party’s organisational abilities do not stretch beyond that to finding other ways to involve people like Abraham.

It is a not uncommon story. For all sorts of reasons – many understandable in a world of hard-pressed volunteers – people find that their local party does not work as a way of them personally getting involved. The local party may not be active. Or it may be active in ways that do not suit. Or the member may have a particular policy interest which is not rooted in the area where they currently live. A member passionate about civil liberties, for example, may well find very little happening in their local party relevant to that issue.

As a result, the current dominance of the local party or nothing campaigning model means members are often not involved in the party’s campaigning and so resources are wasted.

It doesn’t have to be like that.

We have a leader in Tim Farron who is great at motivating people to act. Let us use that. Let us marry his inspirational abilities with a party organisation which gives people ways to get involved even when their own local party is not the direct solution.

In other words, what the party needs is a ‘local party of the last resort’³² mind set so that where – for whatever reason – a local party is not involving people, there is someone else who is doing that.

Directly involving individual supporters even in areas without a wider infrastructure in place (yet) is what the best US political campaigns are often very successful at. For all his eventual defeat, the way the Bernie Sanders campaign did that is a model for the Liberal Democrats to carefully study – especially the provision of tools which enabled anyone to get campaigning right away where they lived and the creation of a supportive, invigorating online community to keep them motivated.

Recommendation #35:

For each of the campaign topics identified by the CCC (see Recommendation #1:), campaign resources should be produced which allow individual members to directly take part in a campaign, just as an individual member of a pressure group can take part in its campaigns.

Recommendation #36:

In particular, for each of the campaign topics, individual members should be given the opportunity to buy leaflets to deliver to their neighbours. The printing, delivery and paying for such leaflets can be done by third-party print-on-demand services, making the administrative overhead to the party very low whilst empowering individuals to take part in campaigns much more easily than currently.

³² Thank you to Pete Dollimore for adding the phrase ‘local party of last resort’ to my vocabulary.

Desirable as both these recommendations are, they do have the downside of being about an individual interacting with the party in rather a solitary, even impersonal way. That will suit some, but usually a more collective, social side is beneficial too.

Recommendation #37:

The federal party should organise a quarterly schedule of national ‘volunteer phoning days’ where members can take part in phone canvassing sessions from home, but feel part of a larger operation – and where other parts of the party can put on events to invite members to group phoning sessions too.

Recommendation #38:

As part of the national phoning days, each held and target seat should organise an in-person event for members from other areas to come to, giving them a route to involvement regardless of their local party and getting people in the habit of traveling to such seats.

Recommendation #39:

The records of who took part through the previous two recommendations should be fed back to local parties through the party’s standard database systems. This way not only do more members get engaged with party activity, but also local parties are then better placed to follow up on this and build up their own direct activities too.

Moreover, there is a way in which social media can supplement or even partly replicate the wider week by week interaction with the party which the best local parties provide for their members and supporters. The best current example of this is the highly successful Lib Dem Newbies group on Facebook, which provides new (and some not-so-new) members with a regular source of engagement with the party regardless of how well organised or welcoming their own local party is. It also works regardless of how much or how little the member feels rooted in a particularly geographic area.

Being ‘the local party of last resort’ is not only about covering for local party weaknesses. It is also about covering for members for whom geographically-delineated local party structures feel as out of place as the idea of going to a high street store to rent a film feels to people used to Netflix. As I wrote in 2015, “The Liberal Democrats (and other parties) increasingly look to me like one of those firms that had hundreds of high street outlets – and whilst its customers were moving online failed to match that switch by moving more of what it did locally into the online world to match. Woolworths should not be a role-model for political parties, but it often looks as if it is.”³³

Creating such welcoming communities is not easy. It requires hard work and a deliberate purpose. Having a community that is welcoming to new people is very different from one where, for example, a small existing community enjoys its in-jokes and robust exchanges between people who have

³³ *Woolworths should not be a role-model for political parties, but it often looks as if it is:* <http://www.markpack.org.uk/132780/woolworths-should-not-be-a-role-model-for-political-parties-but-if-often-looks-as-if-it-is/>

known each other for decades. What is enjoyable to those people can be extremely off putting to others.

Such communities do not have to be officially run by the party, and there can be benefits from the greater flexibility of communities not being official. But what the party should do is to ensure that members do have a good route in to welcoming communities, whether they be official or not.

Recommendation #40:

Part of the welcoming process for new and renewing party members should be to introduce them to active, positive and welcoming digital communities. Where these already exist thanks to the efforts of volunteers, the party should support rather than replicate or replace.

The wider organisational ecosystem

Alongside the extra routes for local party activity and member involvement set out above, there is a role for other organisations and structures too. Local parties are, by their very nature, based on specific geographic areas. That makes sense given how much of the electoral and political landscape is also rooted in specific geographic boundaries.

Much, but not all. Not all political interest is rooted in geography. It can be rooted in issues or in communities of likeminded people. Someone passionate about civil liberties, or greater rights for refugees, or wanting to support fellow election agents, will not find the local party structure one designed to cater well for their interests.

Which is why the various party bodies (often, but not always, AOs and SAOs) that represent specific interests also have an important role to play. They are another way of involving people, particularly those for whom where they currently are living does not carry huge weight in their political interests, but a particular sectional interest does.

Despite the importance of this potential role, party bodies have usually had a small membership. It is far from uncommon for a party body covering an issue of interest to millions to have a membership barely into three figures, if that. The recent view of AO and SAO status has not painted a happy picture of overall membership levels.

Recommendation #41:

The Federal Executive should enhance the role of party bodies in reaching out to new supporters by implementing the decision made in principle to allow AOs and SAOs to recruit new members to the party in the way that currently only local parties and Liberal Youth are allowed to.³⁴

Recommendation #42:

The Federal Executive should set out a gradual but sustained increase in the minimum membership requirements for AOs and SAOs, providing a clear incentive for them to grow.

³⁴ Of course, any AO or SAO activist can go out armed with a membership form. The difference made by giving such bodies the same 'membership enrolment' status as local parties is that it opens up extending the financial incentives for membership recruitment to them. It also provides a route for membership of the party which would make more sense for members who feel their current geographic area is not particularly relevant and instead relate better to an interest group.

A “Friends of the Liberal Democrats” scheme

The steps set out for involving individual members in the party’s campaigning need not be restricted just to paid up full members. Just as successful local parties often have at their organisational bedrock a network of local deliverers who are predominantly not party members, so the steps for involving individuals more in the party should also reach out to those non-members willing to help but for whom regular local leaflet delivery is either not on offer (because the local party does not do it where they live) or is not their thing.

There is a parallel challenge and opportunity for local parties too in finding ways to involve supportive non-members more and increase their entanglement with the party.

One possible answer to both challenges is to help turn fleeting engagement into longer-term involvement with a registered supporter scheme, preferably given a less formal and more approachable name such as a ‘Friends of the Liberal Democrats’ network.³⁵

Already versions of this exist in many informal ways with local parties including non-member helpers, donors and interested people on the mailing list for newsletters, on the invitation list for events and on the email list for financial appeals. Supporters are, in effect, registered now – just without telling them that they have been and without systematically recording the data so that people are not lost track of if they move between local parties.

There is a risk that more formal registered supporters scheme may cannibalise membership, but conversely it could fill the big gap between likely membership and desired size of core vote. Moreover, outside politics it is quite normal to offer tiers of involvement, rather than expecting anyone interested in a bit more to make the big leap all the way to fully signed up formal membership.

Recommendation #43:

Commence a set of pilots of ‘Friends of the Liberal Democrats’ schemes.

³⁵ The idea of building up a large network of supporters may sound like an echo of small donor-fuelled US Presidential campaigns, such as Barack Obama’s. But it is just as much an echo of the Liberal Party’s past and previous recoveries. The post-Second World War Reconstruction Committee included in its wonderfully named report *Coats off for the Future* the recommendation that constituency parties should concentrate on collecting small sums of money from large numbers of supporters.

What local parties can do before winning council wards

The previous section has set out ways in which the party can ensure members get involved regardless of how well their local party does at engaging them.

Another part of rebuilding the Liberal Democrats must be helping the weakest local parties rebuild too. A major obstacle here, as mentioned above, is that the party's model for local party development relies on the local party finding one or more people who want to be local councillors and for the next set of local council elections to be in sight. Take away one or both of those and most of the party's encouragement and support for our weakest local parties misses the mark.

This is a missed opportunity. But it won't be missed if the ideas set out already in this pamphlet are followed.

By running national campaigns which are real campaigns – with objectives that members all around the country can contribute to, the party will also be putting on campaigns which local parties of whatever strength can take part in. The weakest of local parties without anyone yet identified who is willing to stand seriously for council could still buy in to a few leaflets (Recommendation #31:), take part in phone canvassing sessions put on by a nearby seat (Recommendation #38:) and raise money by hitting activity targets which simply require it to do better than before (Recommendation #23: and Recommendation #24:).

The internet can help too.

Recommendation #44:

Every national online petition the party runs should ask for postcode so that the data can be shared with local parties via Connect – providing a key source of new data, including email addresses, even for the weakest party.³⁶

Recommendation #45:

To make it easy for even the weakest of local parties to have a steady stream of new and relevant social media content, the federal party should create a dedicated feed of one Facebook-friendly story per week and a team of volunteers to help any local party or branch set up automatic posting from that feed to a Facebook page and a Twitter account.³⁷

³⁶ Currently such petitions frequently do not ask for postcode, making it impossible for data to be shared back with other parts of the party for them to be able to benefit from too. As of early September 2016 the federal party has started to feature postcode boxes more frequently once more, but the data is not yet flowing through the party and the application of postcode boxes is not consistent.

³⁷ This is easy and free to do by using tools to have the feed automatically posted to a Facebook page which then in turn generates a tweet from a pre-selected Twitter account. With a little bit of setup, therefore, any local party, brand or candidate can have a very low maintenance pair of social media accounts which would amplify the party's overall messages. This is a small start – and from small starts much bigger things can grow.

A new team model for winning Parliamentary constituencies³⁸

Then there is the problem at the other end of the model, the work until exhaustion duo of candidate and agent.

Party reviews into election results and diversity frequently paint a gruesome picture of how self-destructive the candidate plus campaign organiser model of winning a Parliament seat frequently turns out to be. The model places huge strain on the two people, and given the scale of salaries the party can afford to pay organisers it often asks far more than is reasonable of the resulting young and inexperienced person who is secured at that salary level. Talent and obsessive hard work can paper over the cracks of that approach, but it is only papering over the cracks and results in reviews of how party staff feel they have been treated rarely being pretty reading.

It is no coincidence, then, that our most successful areas, almost always we have a third person in the two person model. That third person is a long-term volunteer who not only shares the load but brings institutional knowledge, long-term perspective and extra leadership. It is the role I have played in the past, for example. A core three person model, by sharing some of the key load, also makes it possible to concentrate more on building a wider team too rather than getting lost in struggling just to keep on top of the most urgent items.

Yet so much of our training and support is built on the two-person model. We need to change that, and move to a three person model – candidate, campaign manager and organiser.

Recommendation #46:

Create a new Campaign Manager Programme, to mirror the Leadership Programme in identifying and nurturing the best talent for campaign management.

³⁸ Although written primarily from the perspective of Westminster constituencies, the problem and the solutions are also applicable to the first-past-the-post constituencies in the Scottish Parliament and Welsh Assembly.

Pillar four: Innovation

Digital, of course, is central to this. Moreover, digital is the closest thing we have to family friendly campaigning for candidates, thanks to the flexibility it gives over time and location. That is important as we work to improve diversity (see Pillar two).

Digital needs to be integrated as closely with non-digital as vowels and consonants are in press releases. Because, for example, email is the best channel for prompting action, and face-to-face is the best way to get email addresses. Integration is key.

Recommendation #47:

Create a 'digital audit group' of party volunteers who audit any proposed party campaign materials and provide specific recommendations on how to make them digitally savvy.

There is, however, much more to innovation than just digital. There is also a need to move to a wider culture of testing, evaluating and sharing the lessons.

At the moment, very little outside of digital activities is measured and evaluated, and even less is then shared. The expensive and detailed testing of the impact of different campaign material formats which the party carried out in the 2010-15 Parliament, for example, has not been shared with the overwhelming majority of party campaigners who make decisions about which formats to use.

In many respects the party has moved backwards, as there used to be a healthy cycle based on the same key people being involved in winnable Parliamentary by-elections over decades. Different tactics would be tried out, results assessed and then either rolled out more widely, tried again in a different form or quietly rejected. The evaluation process was not rigorous in the sense of detailed analytics and statistically significant results tables. It was, however, serviceable in relying on close examination of changes in canvass data, a good political nose and repeated experience. Recurring bumps in the trends of canvass data demonstrated the worth of campaigning innovations such as tabloid newspapers, handwritten letters and magazine-style publications.

The learning and testing methods were far from perfect. They were also, however, usable and produced results. Higher staff turnover, fewer winnable by-elections to test techniques in and an ossification of tactics into a sacred set of steps all contributed over time removed most of those strong points.

What is more, as expertise outside political parties in campaigning has grown, with academics and pressure groups in particular often accumulating large volumes of experience, data and conclusions, the party has not kept up with bringing in such external expertise to help.

Recommendation #48:

Set up a Testing and Evaluation Advisory Panel, bringing in friendly expertise from outside the party's staff and even membership, to support the party's efforts to learn and test.

Recommendation #49:

Create a central, shared depository of campaign evaluation test results so that the scattered knowledge which exists in the party can be collated and accumulated.

Part of successful innovation is not simply doing things right – it is about learning from mistakes too.³⁹ Yet the party’s learning style militates against this. ALDC by-election reports, fringe meetings, training sessions and so on – all happen to showcase victories but do not go for learning from defeats in the same way. ‘How we won X’ is the usual title, all but eliminating ‘What we learnt from losing Y’. We need to be comfortable with testing, learning, sharing results and accepting that not everything will be perfect first time.

Recommendation #50:

ALDC should start showcasing not only by-election victory stories but also (with the consent of the local teams) lessons from non-victories too.

Recommendation #51:

A new award should be added to the annual party awards for the person or team who carried out the best campaign experiment or innovation – with the award open both to ideas that turned out successful and those that did not but which generated useful data in doing so.

Just as a Whitehall minister rolling out a top down, untested, blanket policy for everyone does not work well for policy, that too is not the way to innovate and learn.

Learn, experiment, run collaborative pilots with local parties, teams and candidates. That is the way to go.

³⁹ Matthew Seyd’s book, *Black Box Thinking*, is an excellent guide to how an openness about learning from mistakes can fuel a culture of repeated improvement reaching high performance. This is not just about how party HQ or the party ‘centrally’ views failure. It is also about how members view it. Just look at the reaction of many party members to HQ doing something that they think is not perfect. Anger, derision and hostility are far more likely to be expressed online than praise for experimentation or defence of failure as an inevitable part of learning and improving. Of course the angriest voices online are not the most representative, but the silence from others who mostly pass by without defence of failure is just as much part of that culture. If we want to do things differently, we need to be willing to support each other when they do not work first time.

Meaningful measurement

Getting the party's targeting plans for and at the next general election right will be crucial to the party's longer-term development, even survival. Yet the party no-longer has a set of key performance indicators (KPIs) which allows the performance of constituencies to be effectively tracked. The KPIs used during the 2010-15 Parliament, for example, were based on outputs (how much are people doing?) rather than on impact (are we winning over support?). It was possible to hit all the KPIs and lose in a landslide.

The dominance of KPIs based on volumes of activity had their day in 1997 and 2001 but we're not in that world any more. With other parties having copied the type and volume of activity, knowing how much a seat is doing is no longer a useful guide on its own to likely result.

To make matters worse, the party's previous use of tracking polling to monitor progress (or not) in key seats during general election campaigns was discontinued for the 2015 general election.

Activity measures need to be accompanied by a measure of what impact is being secured. The answer is to build up a much higher volume of regular telephone canvassing, based on random selection of names from the register in each seat.

The canvass results from telephone canvass calls to a randomly selected set of voters is not the same as accurate constituency polling. However, it is much cheaper, can be done in house – and tracking canvassing data is, when done well, an established successful route to tracking movements in public support. To generate enough data to be able to start tracking changes over several months would require an increase in the usual 'peacetime' level of phone canvassing activities in nearly all seats. That too, however, would be a good thing as building up a larger team of volunteer phone canvassers increases the capacity of the local party and involves more members.

Moreover, if enough seats take part in such randomised canvassing each month, this also provides enough data to give the party a way of tracking whether its regional or national activities have had any impact.

Recommendation #52:

Each held and target Parliamentary constituency should take part in a program of randomised telephone canvassing, making 200 completed calls in each seat per month.

Recommendation #53:

The party should include key seat tracking polling during future general election campaigns.

Conclusion

The adrenalin rush from another dramatic Liberal Democrat by-election gain is addictive. It is even necessary for motivation in an organisation that rests so heavily on volunteers.

It is also, however, apt to mislead for the smile generating, headline catching by-election wins have been accompanied by other signs of Liberal Democrat recovery which vary from anaemic to minimal.

Whether it is national voting intentions, leadership ratings or ownership of issues in the eyes of public,⁴⁰ the wise assessment is not how well things are going but how much more there is to be done, much of which has barely started.

That is why this pamphlet sets out a viable route to Liberal Democrat recovery, with the four pillars of building a core vote, increasing capacity, a different model for local development and innovation that add up to Targeting Plus.

Each has been illustrated with individual recommendations, all of which would be beneficial. They are also, however, in a way illustrative because what really matters is the determined leadership at all levels – from federal party through to local branches and party bodies – to achieve those four pillars.

⁴⁰ An example: post-referendum, the proportion of voters who think the Liberal Democrats have the best policies for Europe is (still) in single figures.