



LIBERAL DEMOCRATS

PARTY BODIES REVIEW

Final Report



DECEMBER 2020



BACKGROUND

The Federal Board commissioned the Party Bodies Review Group to investigate the status and situation of the more than 30 Specified Associated Organisations (SAOs) and Associated Organisations (AOs) within the party.

The Review Group was asked to recommend any changes that ought to be made, either formally, through constitutional rules, or by changes in party operations, for example in the level of support SAOs and AOs receive from the federal party.

As part of our research, the Review Group has:

- Offered interviews with at least one executive officer of every SAO/AO, with around 30 interviews carried out in total;
- Launched a survey for members of SAO/AOs, with over 100 members taking part;
- Produced a draft report which went to the Steering Group and the Federal People Development Committee in autumn 2020;
- Ran a series of consultative sessions with the chairs of SAOs and AOs and inviting feedback on the draft report.

This document outlines our research findings and our final recommendations.



RESEARCH FINDINGS

General findings

- Among SAO/AOs, there is huge dedication and genuine passion, with many undertaking demanding workloads voluntarily;
- SAO/AOs can offer a huge amount to the wider party, including recruitment, engagement, diversity advice, training, policy creation and building links outside the party (e.g. trade unions);
- SAO/AOs can offer a huge amount to member experience including amplifying the voices of under-represented groups, providing a route to activism for members in small local parties or who can't get involved in electoral politics.
- Many members are completely unaware that SAO/AOs exist;
- Low resources and high administrative costs are a significant barrier to improvement, including recruitment and engagement;
- Many SAO/AOs feel disconnected and 'outside' the wider party, not receiving the support and proactive engagement that local parties get from the center;
- There is a strong willingness to take on additional responsibilities to support the wider party strategy, but many find it hard to engage with the party to make that happen;
- Many feel it is important to maintain the independence and purpose of each SAO/AO but to work a lot closer with each other and the wider party to achieve our shared goals in bringing about a liberal future;
- There is significant confusion about the purpose and value of SAO/AOs in the party, having two types of organisation with different rules compounds this.

Membership and Communications are Key

- There is a wide variety in understanding of many SAO/AO's individual missions, strategy and objectives;
- Some SAO/AOs need support on areas of strategy, recruitment and engagement in order to realise their full potential;
- There is no systematic link to the wider party strategy (e.g. recruitment, campaigns, diversity etc), which misses the opportunity to increase the party's collective impact;



We often have questions but don't know who to ask. My local party has someone they can talk to but [our SAO] does not.





- Conference is often the only mechanism for SAO/AOs to recruit members. While it is acknowledged that Conference needs to raise money, the cost of holding an event is prohibitive and takes up the overwhelming majority of the annual budget. As a result, many choose to hold their sessions outside the main fringe, which reduces exposure to new members, which in turn limits their income.

Low resources and high admin are severely limiting

- Levels of funding are extremely low, which prevents further growth and development (ALDC and to a lesser extent Young Liberals are obvious outliers);
- Most SAO/AOs are confused about what training is available;
- With a few exceptions, there is no staff support for SAO/AOs and requests for help are often unanswered, with many SAO/AOs not knowing where to turn;
- Admin, finance and compliance are burdensome, partly due to limited technology;
- There are concerns with the fairness of support and funding from the central party, with some citing a 'lucky few' that receive funds or training.

A damaging disconnect with the wider party

- Most respondents commented on receiving little support from the main party and felt they were on the 'outside'. Many felt that Party HQ should be focusing on bringing SAO/AOs together, providing more information and data;
- Though they are very keen to help the party and have a lot to offer, they often do not have the network or route to do so. For example some SAO/AOs would be happy to offer diversity training to local parties but they cannot reach all local parties to offer this;
- There are few opportunities to connect with other SAO/AOs and share knowledge and ideas, meaning many end up 'reinventing the wheel';
- Many feel the party does not value their experience or expertise in policy areas and engagement is heavily dependent on individual MPs or staff being proactive. At the same time the federal party is trying to engage members with policy centrally - much of that could be done by SAO/AOs. Both the party and members interested in policy lose out.



The times I have enjoyed being on [my SAO] executive most are when I've been asked for advice and been able to help the party.



SURVEY RESULTS

Nearly all the respondents feel a connection to the Liberal Democrats as a party and what it stands for. However, most of those that are 'disillusioned' are also those that feel their SAO/AOs are not taken seriously by the wider party.

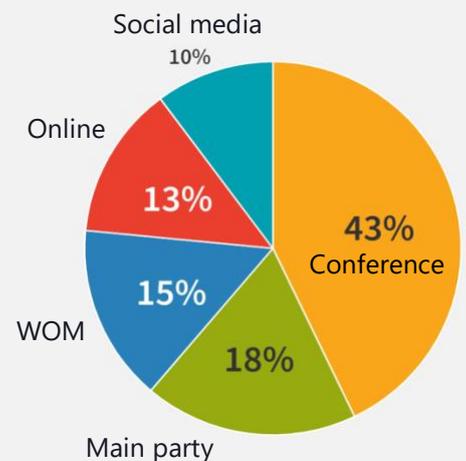
Many respondents claimed that SAO/AOs were not given enough of a platform to make a difference within the main party. They stated that smaller groups were equipped to adapt quickly and make efficient changes but that the opportunities to do so were infrequent.

Most respondents wanted to see more integration, better communication, an overhaul of current procedures, and more collaboration between the smaller groups and the main party.

With a higher positivity rating for the main party as a whole than their specific groups, it appears that most respondents' discontent comes from how the AOs and SAOs are organised, led, and viewed by others.

It was a common theme that smaller groups were seen as 'specialist', 'experts in their field' and 'diverse' but also 'chaotic', 'unorganised' and 'ignored by the main party'.

HOW DID YOU FIRST HEAR ABOUT YOUR SAO/AO?



Nearly all respondents said they joined due to personal interests in the specific cause or community and the sense that the main party was not providing what they wanted.

HOW DO YOU PARTICIPATE WITHIN THE GROUP?



N=117

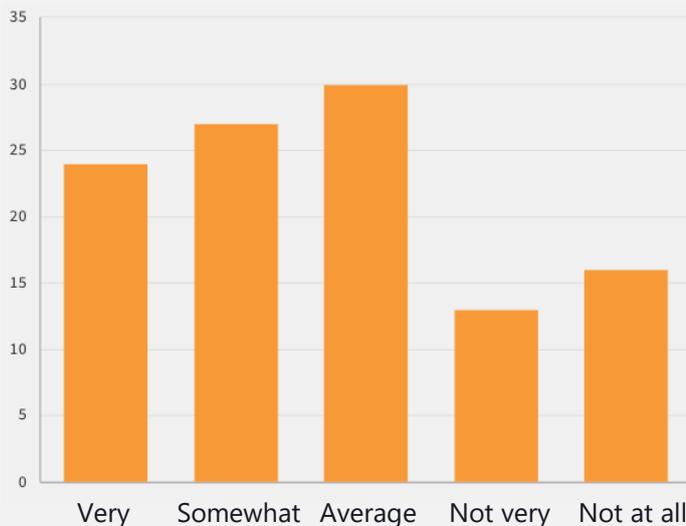
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All initiation [of engagement with central party] comes from us, they never reach out proactively.

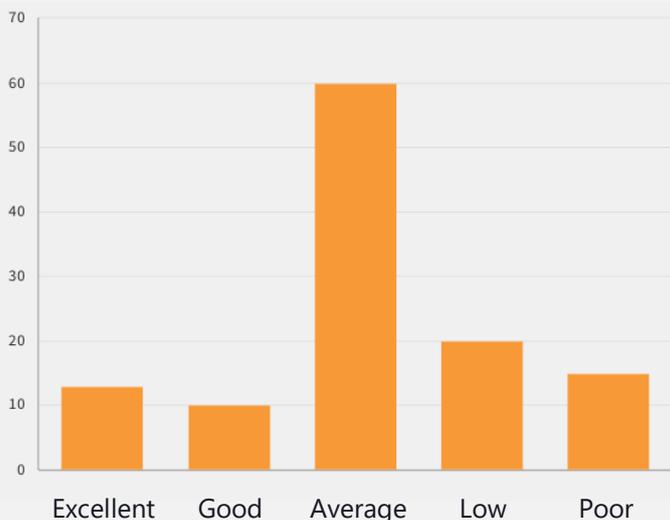
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HOW BENEFICIAL DO YOU FIND EVENTS AND ACTIVITIES ORGANISED BY YOUR SAO/AO?

Those who did not find events to be beneficial stated that it was due to poor organisation or opportunities, unengaging subject matters or lack of inclusivity

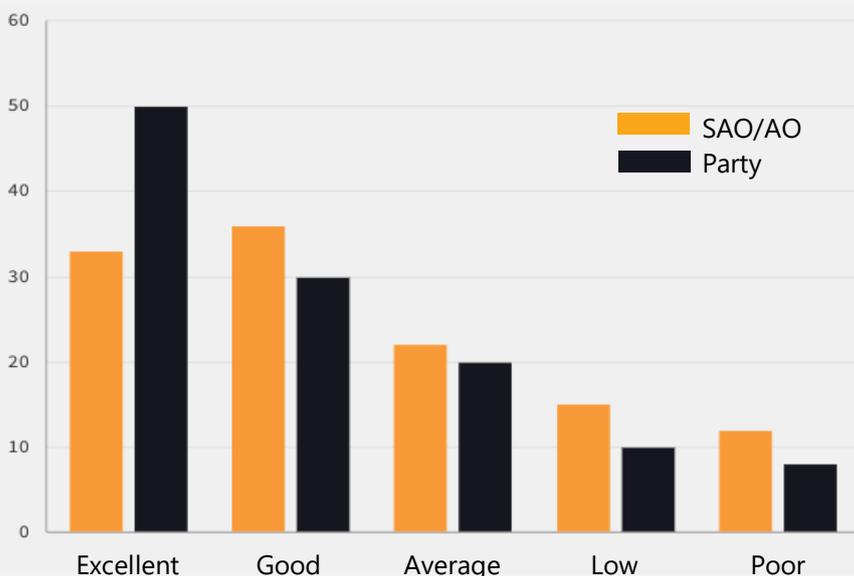


HOW WOULD YOU RATE THE SUCCESS OF SAO/AOs WITHIN THE PARTY?



41% of respondents thought the most important change needed was for the party to treat SAOs and AOs with more respect and provide more support.

HOW WOULD YOU RATE YOUR EXPERIENCE WITHIN YOUR SAO/AO AND THE PARTY?



Those with a positive experience of their SAO/AO or the party said it was due to 'shared values', being 'part of a family' and the ability to get involved and feel appreciated.

Those with a negative experience of their SAO/AO cited a lack of organisation, a feeling they aren't 'productive' and disappointment in how the party treats their group.

Those with a negative experience of the party said they were 'disillusioned', 'concerned for the direction' or had limited opportunities in their area.



RECOMMENDATIONS

Our recommendations fall into four broad themes, each of which is designed to address a particular need identified through our research.

The following pages detail specific recommendations under each theme.



A clearer status within the party

by simplifying the constitutional rules governing SAO/AOs, reforming the application process and ensuring the wider party and membership is aware of the contribution SAO/AOs make to party life.

A higher priority within the party

by providing effective, targeted support to SAO/AOs, including improving access to training, technology, critical information and additional funding, as resources allow.



A larger audience within the party

by actively promoting SAO/AOs to party members in a variety of ways, understanding that this will improve member engagement in the wider party.



A louder voice within the party

by creating a Forum for SAO/AOs to share ideas and resources, align strategies and raise issues collectively with the wider party.





A CLEARER STATUS

The current status and designation of SAOs and AOs has remained more or less the same since the party's formation in 1988. While it may have suited the party for many years, we believe it is no longer fit for purpose, being confusing and unnecessarily burdensome. It's time for reform. We propose the following constitutional changes.

One

Create a single class of party body called an 'Affiliated Organisation', which will have the same rights and responsibilities as current SAOs.

All existing SAO/AOs will automatically become Affiliated Organisations should they wish to and provided they fulfil the membership requirement below. Affiliated Organisations would be able to recruit party registered supporters and other non-members who support the fundamental values and objectives of the party.

Two

Amend the application process Affiliated Organisations, including:

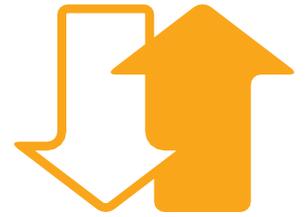
- A minimum requirement of 30 party members from at least two local parties;
- Initial approval by Federal Board;
- After a 'probationary' period of one year from the date of Federal Board approval, final approval by Conference. During this time, Affiliated Organisations will not be able to propose Conference motions;
- A commitment to, and ongoing demonstration of, appropriate governance, accountability and fiduciary responsibility.

**Existing SAO/AOs that have had over 30 members for at least one year will not need to complete this probationary period.*

Three

Draft a clear statement about the purpose and value of Affiliated Organisations and their role in creating a rich, diverse and active party. Publicise it among members, staff and committees and add it to the Federal Constitution.

This statement would be about Affiliated Organisations in general and would not prejudice any existing statements that SAO/AOs have in their independent constitutions. The statement could be drafted by the Affiliated Organisations Forum proposed in Recommendation Ten and put before Federal Board for approval.



A HIGHER PRIORITY

For years, SAO/AOs have been well down the priority list of the wider party, leading to a lower level of support than that of local parties. This needs to change, not least because SAO/AOs can play a crucial role in supporting diversity, rightly a priority us all. The time has come to stop seeing SAO/AOs as a burden and start seeing them for what they really are: a major asset to the party and a critical source of enjoyment, information, curiosity and community to thousands of members.

Four

As funds become available, create a pot of money for Affiliated Organisations to apply for, akin to a charitable fund. To ensure a good return on investment, an independent group of members and staff could review applications, ensuring each contains a project plan with clear targets – for example on member recruitment – and a commitment to providing a report on whether or not the project was successful. The fund should not override any existing grants from the federal party.

Five

Take specific action to improve the Federal Party's support to Affiliated Organisations, including to:

- Improve technological support, including access to membership database Lighthouse, and increase awareness of the tools that local parties use. We know changes to Lighthouse could be costly, but we believe it should receive high priority within the party's plans for technological improvements;
- Promote existing training and ensure Affiliated Organisations know they are welcome to attend, even where training is marketed towards local parties, and consider what additional training they may need in future plans;
- Reduce the cost of Conference room hire for Affiliated Organisations holding their AGM at Conference;
- Ensure Affiliated Organisations are informed about other fringe applications so they can make decisions about the timing and content of their own events;
- Provide proactive and constructive engagement from staff where Affiliated Organisations can increase value and reduce staff time, for example running training, writing policy or advising on diversity.

Six

Ensure Young Liberals can be recognised as a member in two local parties if they are studying away from home. To prevent permanent dual membership, we recommend one of the memberships will expire after 4 years, unless actively renewed.



A LARGER AUDIENCE

Many SAO/AOs have few opportunities to recruit members beyond Conference. Some are trapped in a vicious cycle, with low member income preventing further recruitment investment. We believe the party can do better. By helping them grow their membership, the party will ensure SAO/AOs become more sustainable and active. This will pay dividends - SAO/AOs play a crucial role in engagement so helping them will make it easier to achieve central objectives on engagement and activation.

Seven

Adapt existing Federal, State and Regional Party operational plans and internal communications strategies to ensure they promote Affiliated Organisations and their work to members and local parties, including to:

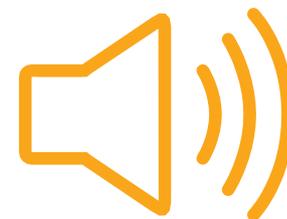
- Ensure websites contain an improved explanation of and signposting to Affiliated Organisations;
- Assess the promotion of Affiliated Organisations in the current member journey and implement any improvements required;
- Promote existing events hosted by Affiliated Organisations without increasing the burden on staff – for example, groups could send upcoming events to staff each month, which would then be put into a single email to members;
- Where events are already planned by the central party, such as panel discussions or policy Q&As, invite Affiliated Organisations to participate;
- Engage Affiliated Organisations in policy development, for example asking them to advertise working group applications in their networks;
- Ensure Parliamentarians and other spokespeople are able and expected to communicate with relevant Affiliated Organisations on a regular basis;
- Ensure local parties are aware of training offered by Affiliated Organisations.

Eight

Trial promotional partnerships with Affiliated Organisations, prioritising those with a focus on diversity. While the exact nature of the trials will be determined by staff, we suggest one involves allowing new members to join Affiliated Organisations at the same time as they join the party on the federal website. We believe this would lead to the highest uptake while minimising any downsides. The Federal Party could keep a percentage of the membership fee in return to help pay for costs.

Nine

Trial additional, low-cost ways for the party to promote Affiliated Organisations. For example, creating an adapted membership incentive scheme or offering access to part of the membership database for a limited time to recruit and engage members.



A LOUDER VOICE

Given some SAO/AOs represent marginalised groups or those with a particular policy interest, often their membership will inevitably be small, often on a par with that of a local party. But while local parties all have a state or regional party to support and represent them, there is no such body for SAO/AOs, so many of them struggle individually to make their voice heard. To give Affiliated Organisations a stronger voice and ensure they can participate fully in decisions which affect them, we have made the following recommendations.

Ten

Create a Forum, made up of the chair of each Affiliated Organisation. The Forum it should have the freedom to decide its own remit and composition, but some examples of activity could include to:

- Draft the statement of purpose outlined in Recommendation Two;
- Maintain a contact list of each Affiliated Organisation's executive team;
- Develop template constitutions and standing orders and share best practice on governance, fiduciary responsibility and operations;
- Coordinate on Conference activity, for example sharing facilities;
- Request to be consulted on key strategic developments within the party;
- Increase idea sharing and communication between their respective memberships.

Eleven

Nominate a member of the Federal Board to represent the Forum and ensure the Federal Conference and Federal Policy Committees take steps to liaise with the Forum on an ongoing basis.

The Review Group would prefer the Board to create a new position to represent the Forum. However, we recognise that efforts to improve the Board's workflow following the 2019 General Election Review mean that identifying an existing member would be simpler.

Twelve

Ensure a single member of staff becomes the point person for the Forum. As staff are extremely stretched, we would not expect them to carry out any administration or time-consuming work, but instead advise on strategy and objective-setting, signpost resources and information, and facilitate network building.



NEXT STEPS

This report will be delivered to the Steering Group on 3 December 2020.

The Review Group would like to request that the Steering Group provides a written response to the report detailing:

- Which recommendations it accepts;
- For which recommendations it intends to seek Federal Board approval;
- Which recommendations it rejects, why and, if appropriate, what alternative action it intends to take.

We would politely request such a response before 1 January 2021, owing to the deadline for Spring Conference motions being the 6 January.



THE REVIEW GROUP

Four party members were appointed by the Federal Board to carry out this review. They are:

Flo Clucas OBE (Chair)

Cabinet Member on Cheltenham Council and former Chair of Liberal Democrat Women

Steffan Aquarone

Group Leader on Norfolk County Council

Bess Mayhew

Former member of party staff and current Chair of the Federal People Development Committee.

Tim Pickstone

Chief Executive of the Association of Liberal Democrat Campaigners and Councillors, Councillor and former Group Leader of Bury

The Review Group was supported by member of party staff, Jack Coulson, who did a phenomenal job and we would like to thank him for his services, without which this report would not have been possible.

We would also like to thank everyone who agreed to be interviewed or participated in a survey during our research process, as well as those SAO/AOs who sent a formal response. We hope we have created a set of recommendations that does justice to your work and will make a difference to your future successes.