

# Boost Guide



Your essential guide to engaging with your members, supporters & donors.



1<sup>st</sup> Edition, 2020

# **Boost Guide**

## **Liberal Democrats**

A publication from the 2017-2020 Federal People Development Committee.

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A downloadable online copy of this document can be found at:  
[www.LibDems.org.uk/Boost](http://www.LibDems.org.uk/Boost)

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# Contents

1. Welcome, p4 - p5
2. Diversity, p6 - p9
3. How to find your people, p10 - p15
4. Data Protection, p16 - p19
5. What the Federal Party sends members, p20 - p23
6. Tone, p24 - p29
7. Email, p30 - p39
8. Phone Calls, p40 - p53
9. Door knocking, p54 - p61
10. Engagement mailings, p62 - p65
11. Events, p66- p71
12. Going the extra mile, p72 - p79
13. Is it working?, p80 - p83
14. Frequency, p84 - p87
15. Tools, p88 - p99
16. Resources, p100 - p111
17. Jargon Buster, p112 - p115

# Welcome

**The best way to give your local party a boost this year is to engage more with your members, supporters and donors.**

Doing so will activate some of the new members and supporters who joined in the last couple of years. There may also be long time members who would now be open to becoming active.

It's also worth remembering that those who already help a little might like to be doing more with the Liberal Democrats.

In this guide we are going to explain how to find your membership data, give you some tips, ideas and examples for how to build a constructive relationship with your members and then give you some ideas for how to evaluate your efforts.

We know that making the extra effort to talk to new members can feel time consuming, but the reward here is huge.

Here's just some of what you can achieve:

- A sense of a growing team in your area
- More deliverers, canvassers, poster sites, clerical helpers (and every other job you can think of)
- More money raised
- More ideas for your local efforts
- A more resilient local party
- You're MUCH more likely to win!

This guide has been put together by volunteers from the Party's Federal People Development Committee, with support and contributions from Greg Foster and the Membership Team in LDHQ and volunteer Mary Regnier-Wilson. All the advice here is tried and tested in local parties across the country.

**If you follow the suggestions in this guide, you will get more members participating in your local activities.**

Just remember the three golden rules of engagement:

1. Think more about what the member or supporter wants and needs, rather than only what you want or need
2. Remember that engagement is a two-way communication - listen to their ideas and feedback
3. Thank them sincerely each and every time they engage with the local party

Good luck!



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# Diversity



# An important note before we begin...

Look at your local activist team. Are they all alike? All roughly the same age and background? The same ethnicity or gender? All from the same part of your seat?

**We want to encourage you in the strongest terms to think about diversity BEFORE you start out on a member engagement project.**

It is always tempting to arrange activities that you would enjoy yourself - but that may actually not be the right environment for people who are not like you.

Think about the kind of members and supporters that you're hoping to engage and design events and activities that would be attractive to them. If you're not sure what that might be, ask some of them for ideas.

The reason this matters is twofold.

Firstly, diverse teams are more creative and better at problem solving. You will run better campaigns with a diverse team, have better ideas and find more success.

Secondly is that as Liberal Democrats we are seeking to represent our community. We can only truly represent their views, concerns and priorities if our membership is representative of that community.

### **Examples you may want to think about**

- Younger people may find it hard to access venues that are far away from public transport hubs
- Older people and disabled people may be uncomfortable standing for long periods of time, or in cold places
- Parents of young children may find it impossible to attend evening meetings, or any events around school/nursery drop off and pick up times
- Religious people may not be able to come to a pub, or may not be able to be around any gambling/raffles
- Women, ethnic minorities and LGBT+ people may be concerned about walking through town centres after dark once the shops are closed, or needing to park in remote car parks
- Disabled people may not be able to get to a room that is up stairs - even one step would bar some people from being able to get into a room
- People from poorer backgrounds may not be comfortable meeting anywhere that requires them to make a purchase to take part (eg buying a drink at a pub or coffee shop, or the ticket price of an event)



It's important to remember that not every person from these groups will feel this way, and not every event has to suit everyone.

It's fine to meet in pubs, hold raffles and ask people to buy tickets to events. Just make sure that you offer a range of ways so that everyone can be involved in a few things, and that you don't exclude the same people every time.

The one thing you should always make sure of is that if an event is something that all members should be able to come to - like an AGM - then you **must** make sure that it is in a venue that is not a barrier to any member attending.

Please make sure that for those events you look for venues with no steps, with clear signage and good parking in a well lit area, and that the building is not a pub or other place that might be difficult for anyone to feel comfortable coming into.

When new people from a different background do attend an event or activity, make sure that they are properly welcomed.

After the event, ask if they have any feedback about how we could improve our activities.

Sometimes we do things that exclude people without even realising it, so it's good to ask for their thoughts.

# How to find your people



# Know who you can engage.

When thinking about how we should engage with members, supporters and donors, we must obviously first find out who they are.

Every local party executive should have a Membership Officer (the exact title may vary!). They will have been given access to a programme called Lighthouse (and if nobody does, email [Membership@LibDems.org.uk](mailto:Membership@LibDems.org.uk)).

Lighthouse contains details about your members, supporters and donors, including contact details and how they joined or donated and how they pay their membership fee, as well as some hints on what they might be interested in doing (if they've told us!).

You can find information about Lighthouse and the data it holds at [www.LibDems.org.uk/Lighthouse](http://www.LibDems.org.uk/Lighthouse) and ask questions about the system in the Lighthouse Users Facebook group at [www.Facebook.com/Groups/LDMembership](http://www.Facebook.com/Groups/LDMembership)

Details of party members and supporters can also be found in the My Campaign part of the Connect Database.

Name, address, and contact details are copied every day from Lighthouse to Connect. Every night, a matching programme is run to match these details to a record in the My Voters database.

## Matching your data

Only about 85% of members and supporters are automatically matched to an electoral roll record.

Differences in the name used, changes of address and other oddities all require some manual intervention to reconcile records.

And of course some of our members (non-EU citizens, under 18's) just aren't on the electoral register.

To ensure you have the most accurate data on your members and supporters you (or your Data Officer) should reconcile the two databases as much as possible. Full details of how to do this can be found at [www.LibDems.org.uk/Membership-Data-Match-Guide](http://www.LibDems.org.uk/Membership-Data-Match-Guide)

The more information we have on our members and supporters the better we can engage with them.

We use Volunteer questions within Connect to show what people have said to us – these are updated each election cycle.

The most useful questions are Poster Ask or Volunteer: Volunteer Status and it's easy to run reports showing all the people who have said yes to these questions in each cycle.

You can also use the Volunteer:General Volunteer question if people are willing to help in other ways, and use the notes field to record the specifics.

It's also important to actually record that members will be voting for us within the system.

To save you time, there's a script in Connect which contains all the questions you might need which is updated each year and called 20XX Member/supporter activation (with the XX being the current year).

This can be used when you look people up in the system or whenever you create phone banks or minivan lists of your supporters.

More information on using Connect can be found at <https://www.LibDems.org.uk/Oskar-Connect> or ask in the facebook group [www.Facebook.com/Groups/ConnectUsers](http://www.Facebook.com/Groups/ConnectUsers)

You can also print a report from Connect which shows the information we have on members at a glance.

When you've created your list, select print and choose the report format 20XX Activist information.

This shows basic contact details, latest voting intention (if we've recorded it) and whether they've previously agreed to volunteer. This report is useful for sharing with colleagues who don't use Connect, but **please take account of GDPR guidelines when doing so.**

This information on members and supporters should be used to ensure that all members and supporters are regularly contacted

by someone from the local party and that the results of that contact are recorded for future reference.

When members interact with the Federal Party (via skills surveys etc) their answers are also fed into Connect or Lighthouse wherever possible and appropriate.

## **Emailing members**

Whilst it's perfectly ok to send emails to individual members from your own email address, for mass emails to members you should be using one of the party approved email senders (Prater Raines, Mailchimp or Nationbuilder) and ensuring you comply with GDPR.

Members email addresses can be downloaded from Lighthouse for use in your email sender, but only if they are opted-in to receive emails within Lighthouse.

To make this easy for you, you'll find a number of pre-built reports on Lighthouse with "Ok to email" at the end. These are people who it's ok for you to email!

Connect can also be used to find people who can be recruited as members.

There are a number of "target pools" within Connect that you can use to identify likely prospects who are worth making personal contact with.

The **Volunteer Prospects**: Tier 1-5 target pools work from algorithms that use previous contact/support to find our most promising prospects.

There's also the **National Website Petition Signers: Signed Petition** target pool, which identifies people who have signed one of the many petitions on our Federal Website and is a rich source of potential activists.

Combined, these lists are absolute gold dust and in some local parties they've found **as many as 50% of these people are interested in getting involved!**

## Using the right tool

If you're managing members, you'll need to use both Lighthouse and Connect. They're two tools that have complimentary, but distinct functions.

Lighthouse is intended to help you run your local party. You can keep member, supporter and donor details up to date in it and it should be where you store all of your information about donors.

Connect is intended to help you contact people. VPBs and MiniVAN are both incredibly powerful tools for doing this.

By keeping all of your voting intention and volunteering information in once place, you'll find it easier to run and win election campaigns.

# Data Protection





# Making sure you're compliant with the law

It seems quite obvious but you should always be on top of data protection when dealing with member and supporter details. In the UK we are governed under the General Data Protection Relations (GDPR) and Data Protection Act (2018).

GDPR breaches carry very serious penalties for people who misuse or mishandle data.

Anyone who processes personal information must comply with the seven principles of GDPR, which make sure that personal information is:

- fairly and lawfully processed;
- processed for limited purposes;
- adequate, relevant and not excessive;
- accurate and up to date;
- not kept for longer than is necessary;
- secure; and
- That we are able to prove we have processed personal data according to the first 6 principles;

## Need to know more about GDPR?

Getting data protection right is really important - so to make your life easier, the party has created comprehensive GDPR guidance, which can be found at:

[www.LibDems.org.uk/GDPR](http://www.LibDems.org.uk/GDPR)

## The essentials

Don't share people's personal contact details - make sure that only people who need to contact members are allowed to contact members - membership secretary, Chair and Data officers as well as candidates/councillors.

Make sure non-Members who are handling personal data have signed an agreement that they will look after the data securely.

Only contact people about Liberal Democrat Party matters and campaigns - this is not information for sharing with any associated organisations.

If someone asks not to be contacted, make sure they are removed. You can do this easily in Connect and Lighthouse. The rules around nuisance calls, texts, emails and data protection are governed by the Privacy and Electronic Communications Regulations (PECR) and are the same for political parties as any other organisation. People have a right to expect that their information will be used in line with the law.

Make sure you pass requests onto HQ promptly - again if someone resigns or requests not to be emailed, make sure to email [Membership@LibDems.org.uk](mailto:Membership@LibDems.org.uk) so the same happens across all platforms. If someone says they'd like to be removed from a database or asks for us to comply with any of their data rights, email [Data.Protection@LibDems.org.uk](mailto:Data.Protection@LibDems.org.uk)

Take care of data properly - we have a duty to not leave people's personal data just lying around or accessible to everyone. This means you should have any stored lists password protected and shred any printed data when it is no longer needed. Please don't use memory sticks.

Voter and member data sent via email should be encrypted and password-protected to maintain our legal obligations (or better yet, share a report in Lighthouse or a link to a list / PDF in Connect). The Party's recommended software is 7-Zip which can be downloaded for free at [www.7-zip.org](http://www.7-zip.org).

It uses strong AES-256 encryption and allows password protection. You can use the following piece of text when sending the zip file to other Lib Dems: The zip file is encrypted with AES-256 for data protection reasons. You will need 7-Zip, the Party's recommended encrypted zip file software to open it. You can download this for free at [www.7-zip.org](http://www.7-zip.org)

You should also make sure you delete any lists you have downloaded from Connect or Lighthouse as soon as you have used the data.

There is a data protection checklist available on the GDPR section of the website for local parties to measure their own level of data protection compliance.

# What the Federal Party sends members



# How HQ keeps in touch

When a person joins the Party, either as a member or as a supporter, they will receive an automatic welcome email from HQ (so long as they provide their email address). This will thank them for joining and tell them about how they can get involved.

Then over the next few weeks, they'll get a series of emails from HQ letting them know:

- How to access the members area
- How to get involved
- How to contact your local party
- How to follow the party on social media
- Finding groups of like minded members via Directory
- How to set their Federal party email preferences.

Soon afterwards, if they joined as a member they will receive a New Member's Pack (supporters get online information only).

This can take 6-8 weeks in times when there is a membership surge, but the Party tries hard to get these to members much faster -



The welcome pack that we send to new members.

within the first two weeks ideally.

These packs contain a lot of information about the Party, a pin badge, contact details for their local party and the person's membership card.

If you're not sure what contact details HQ is providing for your local party, you can check what's listed on Lighthouse under the organisation tab - as that's what we'll be using. If the member joined by Direct Debit, once they have been a member for a year, their membership will automatically renew. They will not be contacted about renewing, as there is no need to take any action. They will get an email confirming they've renewed their membership from the party.

If they joined by making a one-off payment of some kind, starting 30 days before their payment is due (their renewal date), they will receive four posted letters to remind them to renew, and up to 28 emails from HQ reminding them that their membership is expiring (over a period of 120 days).

Each of these efforts costs money, and each year some members just forget to renew (it costs on average £4 to renew a member). Whenever possible, **encourage people to switch their membership to Direct Debit** - as it saves the Party a lot of money!

Supporters don't have a renewal requirement - once they're on the list, they're on the list until they ask to be taken off it.

As a member or supporter, you gets access to the members' area on the Federal Party website, where you can access your email preferences, news from the Party and even access Party training resources.

Members will also receive regular updates by email from the Party on a wide range of news and policy topics. They'll also get emails from their State and Regional party.

Most members and supporters will get 2-3 emails a week from these three parts of the party - so it's worth considering that when planning your own emails.

Members also get a quarterly copy, of AdLib our member & supporter magazine. Once a year, we also send a hard copy to members who don't have an email address on file.

## What members get from HQ:

- ✓ A series of welcome emails, welcome pack and membership card when they join
- ✓ Regular email updates on our work and party business
- ✓ Online copies of AdLib, quarterly and one posted copy a year to those without emails.
- ✓ A comprehensive program of retention activity, if their membership becomes at risk.

# Tone





# How to get your new relationships off to the right start...

When you talk to new members and supporters, whether it's in person, by phone, by email or by post, it is really important to consider your tone.

New members are generally excited. They have just joined, they have made the first move and taken action.

They are looking to us to respond with **enthusiasm**.

New members are generally interested.

They are keen to learn more about politics, about the Party and about the issues.

They want us to give them useful **information**.

New members are generally full of hope and the belief that anything is possible.

## Top tips for communicating with new members

1. Be enthusiastic!
2. Give them useful information.
3. Inspire them.

For many, this is the first time they have ever got involved in politics, so they don't know what jargon like canvassing or delivery means, or how complex it can be.

They have no Lib Dem experience to measure things against, so they may find your objectives too modest and feel you should be shooting for the moon.

They want us to be **inspiring**.

These three elements - **enthusiasm, information, inspiration** - should be in the front of your mind when you talk to members you are trying to activate.

Explain not just what we are doing, but why we are doing it.

Tell them about the brilliant results you have achieved and what you are now hoping for.

## Keep it positive!

Even if you were just wiped out in an election, and took a real thrashing, when you talk to your new members you need to focus on the need to rebuild and develop.

Remember that a lot of people joined us after our terrible 2015 General Election result.

They knew it had gone badly, but they wanted to help lift us back up. It's OK to acknowledge that things have not gone well, just concentrate on what happens now to make things better.

You should also remember that each new member brings in new ideas and opinions that we need to listen to.

Their innocent question about "Why does it have to be done like that?" might be the start of the next great revolution in campaigning.

They might have an idea, or see an opportunity that no one has thought of before.

Try to listen and welcome their ideas, whilst also helping them learn about why we believe some things are more effective than others.

## **Be open to trying things, and spend time explaining our theories and practice.**

Be flexible when new members ask for things. If they want a discussion on a certain topic, or a campaign for a certain issue, or a fundraiser on a particular theme - try to say yes immediately.

Our natural instinct is often to refuse new requests as they are made, because we have tried things before that didn't work, or we already have a good plan, or we are just too busy!

Remember - we want (and need) to engage these new members.

Allow an off-agenda discussion occasionally, if it's on a good topic.

Give away a little control and allow new people to bring new ideas. Don't demand new members fit in with us.

We need to flex a little to allow them room, and that helps us grow and develop our party.

## **Take an interest in them!**

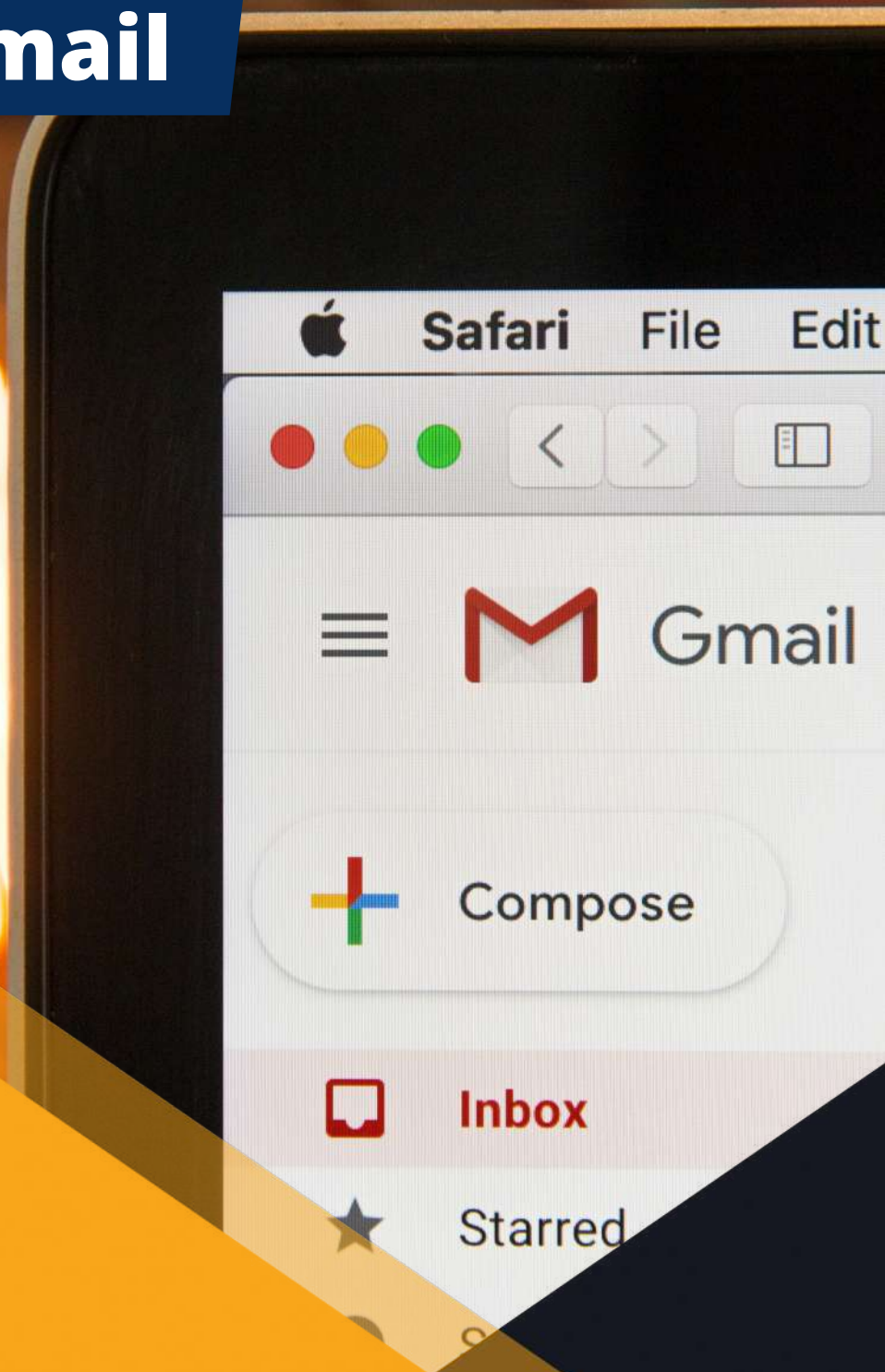
Whilst many new members don't have previous experience of politics they often bring really valuable skills and experiences that can be used in politics.

Ask them about themselves and what they are interested in and try to point them to ways they can use their skills to help the party - accountants, event organisers, data managers, HR professionals and proof readers and many others can be of invaluable help to your campaigns.

It's also worth making sure that whilst you're taking an interest in them and learning things that could be useful, it doesn't feel like an interrogation!

If a member's day job is event organisation, they may not necessarily want to be doing that in their free time as well - ask about what they would like to be doing and help them find a role that excites them too - and that will mean they are more likely to stick around for the long term!

# Email



# A fast, free and easy way to communicate.

Email is a great way to make first contact with your new members and supporters.

You can send it at a time that's convenient for you, and they can read it whenever they are ready to.

It's also the case that many new members have joined online, so they are expecting to hear from us by online communication.

We recommend the following tips to help you get the most from emailing your new members and supporters:

## **Send one welcome email at a time and personalise it.**

When you email more than one person, you cannot say "Dear Louise" or "Dear Adrian", you will have to go with something blander, like "Dear new members". That already sends a signal that you're saving time by emailing loads of people together. It feels a bit less personal, a bit less caring and a bit less warm.

**Take the time, make the effort.** Email one person with one email. Personalise the text. Think about what you write. Include information relevant to their new member interests if they've told us what they are. It could read something like example 1, on page 35.

## **Keep it short**

Try to tell the member about a maximum of 3 (non-meeting) things they can get involved with, or else your message may be confusing, and potentially overwhelming. Keep it all nice and simple.

## **Remember the tone**

This is an important email, it's their first communication from the local party and will set the mood for your future relationship with that member. Be positive, friendly and cheerful. Even if you just lost all your Council seats, welcome new members with a hopeful tone that looks to building for the future.

## **Be timely**

Try to send this kind of welcome email as quickly as possible after someone joins - within 2 days is brilliant, 3 days is good, 4-7 days is OK, more than 7 days is a bit slow.

Remember people are keen when they join! They have taken the step and made the decision, parted with their money and made a commitment to us. We need to respond, thanking them and making them feel valued and engaged as quickly as we possibly can.

## **Think carefully about automation**

We know that some local parties have standard welcome emails.



These can have big advantages - it is much less work to put them together, so they can be sent really quickly.

That quick turnaround also means that the system is more reliable, with less vulnerability to people getting busy or sick. But do be careful. Standard emails or automated emails can feel very impersonal.

**These welcomes should feel like a warm, sincere handshake.**

If you really do not want to spend the time personalising emails, at least consider adding their name at the top, so that it feels clear that it is addressed to the member.

**Make it a routine**

As well as welcoming new members, there may be more longstanding members who are now ready to become more active. Perhaps they have just retired, or saw something on the news that has spurred them into action.

Email everyone about activities, every time, unless they ask you not to include them.

**Remember that email doesn't work on its own**

Email is fabulous as FIRST contact, but is terrible if it's the ONLY contact.

If you send out an email about a campaign event, it's very unlikely that any new people will come along if there is no other follow up.

Once you've sent your email, wait a day or two and then make some calls.

Start the call by asking if they saw your email and say you're calling to give them a bit more information, and to ask them personally if they can make it.

If anyone does show up to an event after purely email contact, then that is a very motivated person - be sure to give them a super warm welcome!

### **Other good email tips**

- Include links to a map that shows the meeting point, or the venue's website. You may know where St John's Church Hall is, but other people may have no clue!
- Follow up - send thank you emails to those who came. Send an email around everyone telling them how the activity went, and attach a photo (just one) of people having fun at the event/activity. See example 2 and 3 below.
- Use an email service. There are several services who provide email list maintenance that are approved by the party, Nationbuilder, Prater Raines and Mailchimp.

## **Emails: Example 1 - welcome to the Party**

Subject Line: Welcome to Anytown Liberal Democrats

Hi Claire,

Welcome to Anytown Liberal Democrats! My name is Miranda, and I am the Membership Secretary for our local Lib Dems.

It's great that you have decided to join us. We have a lot of different things coming up that you might enjoy - social events, campaigning activity and some policy discussions too.

I see that you live in Acacia Avenue. That's in East ward, and we have a coffee morning planned there in two weeks time on the 25th, on Birch Lane - if you're interested in coming along to that, just let me know.

We also have a street stall planned in Anytown High Street on the 26th at 11am, where we are going to be giving out leaflets and posters, and collecting petition signatures for our safer pedestrian crossings campaign. Then there's our monthly Liberal Drinks meet up on the 2nd. With these, a group of us just meet in a local pub for a drink and a chat. If you would like to know more about where, when and what

these are all about, just drop me an email and I can give you more details.

If you're a bit busy the next few weeks, please don't worry. We work all year round and there is always something going on. We will send you occasional emails with details of the events and activities and you can join in whenever suits you.

I hope to meet you soon. Please do email back, or call me on 01234 567 890 if I can help answer any questions you have.

Best wishes

Miranda

## **Emails: Example 2 - to members who came to an event**

Subject Line: Thank you

Hi Sarah,

Thank you so much for coming to join us on Saturday at our street stall in the town centre. We gathered a fantastic 350 new signatures for our safer crossings campaign. We even signed up 4 new members to the Party!

I know it got a bit cold, so I am really grateful that you stayed out with us so long. Thank you for your help. I hope to see you at the Quiz Night next week!

Best wishes

Miranda

## **Emails: Example 3 - to members who did not come to an event**

Subject Line: 350 signatures

Hi Steve,

I wanted to share some great news with you. As you may know, on Saturday a group of Anytown Lib Dems gathered in the High Street and held a “street stall”. We gave out biscuits to the kids, leaflets to the adults and gathered signatures for our Safer Crossings petition.

**In just 2 hours, 350 people signed our petition, and 4 people joined the Party!**

It was a cold day, but there was such a warm, positive feeling from the people we met. We had a lot of fun and those signatures are a real boost for our campaign. I have attached a photo so that you can see our street stall in all its glory!

If you would be interested in coming to a future street stall, or in helping in one of our other campaigning activities, just let me know and I can give you more details.

Thank you for your ongoing support for our Party.

Best wishes,

Miranda

PS Remember that we have a Quiz Night next Friday. Tickets are just £5 each and include a ploughman's dinner. Let me know if you would like to come along.

# Phone calls





# The fastest way to have a conversation

Phoning new members, supporters and donors is one of the best ways of hearing directly what people are able to help with and how they might get involved. Personal contact is the most effective way to activate members and supporters and encourage long term membership.

Many new members have not been a member of a political party before. Call them up to make them welcome and let them know you're here to help.

We recommend the following tips to help you get the most from phoning your members:

## **Be Happy**

Make sure you are feeling good when making these calls - make sure you are upbeat and try and enthuse your new members to get involved.

Just as with emails, be positive, friendly and cheerful. At the very least, make sure you can sound happy!

## **Ask them if it is convenient**

When picking up the phone be sure to ask if this is the right time to talk. We all live busy lives and it might not be the right time. It

might also be worth letting someone know you're going to call them in your welcome email, so they're expecting your call! **If it isn't the right time, ask them when you can call back.** Again this will make the experience much more friendly and warm and ensure that the new members are welcomed correctly and not just rushed or ignored.

## **Know the menu of options**

### **DON'T JUST ASK THEM TO DELIVER FOCUS!**

Know the different ways a member can get involved - when is your next social event, when is your next campaign event and when will you be sending out your emails about them.

There's a great script on Connect (20XX Member/supporter activation) that should give you a full menu of options - and calling through a Connect VPB will make your life easier and make it easier to record the results of a call. Contact your members and helpers personally to ask what they want to do, at least once a year.

Some of the most proactive local parties do phone call audits and store this information on Connect to ensure that people are invited to the right events.

## **Be timely**

Ideally, try and make the welcome calls within 7 days of someone joining or donating. We need to respond, thanking

them and making them feel valued and engaged as quickly as we possibly can. But if it's been eleven months or eleven years, it's still worth a call - you never know, they might have been waiting for your call!

## **Listen and learn**

Remember that you are calling to listen to them as well as talk. New members will often bring a fresh perspective to our campaigning.

The most important thing is to have a welcoming and open attitude. Be sure to record what you asked, along with their responses, so that you do not make the same requests again.

## **VPBs**

On Connect, you'll find a tool called a Virtual Phone Bank - or VPB for short.

This tool makes it super easy to call lots of members and record their responses to your questions and it can even give you a script to help prompt what you want to ask a person.

If you're doing welcome calls, or an audit via phone calls, it's the best way to do it.

It's a good idea to complete the matching process described in Chapter 3 before you do. You can find out more about VPBs at:

**[www.LibDems.org.uk/Oskar-Connect](http://www.LibDems.org.uk/Oskar-Connect)**

## **Example welcome call**

Hello, please may I speak to Claire?

Hi Claire, I am Miranda, and I am the Membership Secretary for our local Lib Dems. This is just a quick call to say welcome to Anytown Liberal Democrats! I'm delighted to welcome you to our team.

Can I ask what prompted you to join? Was it Brexit, or something else?

### **(Talk about reason)**

We have a lot of different things coming up that you might enjoy - social events, campaigning activity and some policy discussions too.

I see that you live in Acacia Avenue. That's in East ward, and we have a coffee morning planned there in two weeks time on the 25th, on Birch Lane - if you're interested in coming along to that, just let me know.

### **(Record)**

We also have a street stall planned in Anytown High Street on the 26th at 11am, where we are going to be giving out leaflets and balloons, and collecting petition signatures for

our safer pedestrian crossings campaign. Is this something you might be interested in joining?

**(Record)**

OK, well if you're a bit busy the next few weeks, no problem. We work all year round and there is always something going on. We will send you occasional emails with details of the events and activities and you can join in whenever suits you.

I am always available on 01234 567 890 if I can help answer any questions you have.

Is there anything you'd like to ask now, or let me know about?

**(Record)**

Thanks again for your time today. I hope to meet you in person soon!

## **Example audit call**

Alongside your recruitment and retention efforts, every Liberal Democrat campaigner should be looking to strengthen the skills base of their team. Every agent, candidate, campaign organiser, fundraiser and so on started somewhere and it is in our interests to help every member and helper learn new skills so that they can help strengthen the party in new ways.

Hello. My name is Miranda, and I'm calling on behalf of the local Liberal Democrats.

Could I speak to Claire please?

Hi Claire, I'm Miranda and I'm helping the local Lib Dems, and I thought it would be a good idea to ring around the members to, first of all, say hello.

Secondly, we would like to know how local members might want to be involved, and to ask whether there are things you would like to do, which you're not already doing.

Would it be ok to ask a few very quick questions please?

**If yes, move on**

**If no, "OK, I totally understand. Thanks for your time."**

What type of issues interest you most? Local, National - any particular policy areas?

Please let us know of any skills, experience or qualifications you have that may be able to offer to the party. From being an auditor to baking cakes, from public speaking to running a bookstall, every skill is useful! Is there anything that leaps to mind that you'd be happy to help us with?

The local party holds a number of events, from our "pint and politics" evenings, where we discuss the latest political events over a drink, to cake sales to raise some funds, as well as formal dinners with guest speakers. Would any of these interest you - or is there another kind of event you would prefer to come to?

The Lib Dems rely on local volunteers to help us keep in touch with local people all year round, not just at election time. Would you be willing to help out, say, for an hour a month in some way?

I expect you're familiar with our local Focus leaflets and that we like to keep you in touch with what's happening locally. What you may not know is that these leaflets are all delivered by local volunteers who do a few up and down their road. It takes maybe an hour once a month or so, and I was just wondering if you'd be interested in giving it a try?

Sending letters to voters is one of the most effective ways of getting our message across, but we need help putting the letters into envelopes. Would you be willing to help with stuffing envelopes, either at home, or in a group with others?

Thank you so much for your time today Claire.

I hope to meet you in person sometime soon.



## **Example call to a campaign event**

Hello. My name is Miranda, and I'm calling on behalf of the local Liberal Democrats.

Could I speak to Claire please?

Hi Claire, I know you have been kind enough to say you would like to get involved in campaigning in the local party and we have a great event in two weeks time.

It's at the Hawk Green reading room near Marple from 10:30am to 5pm on Saturday 12th and we'd love to see you there if you can make it.

We have a range of activities - canvassing, stuffing envelopes and some delivery of our latest Focus leaflet on the environment. We will make sure you are paired with an experienced member of the team who can show you all the ropes.

Do you think you can make it?

If Yes - That's great. I will be there from 10.30 and it would be great to see you. I will send you all the details via email if that is ok and look forward to catching you in two weeks time.

If no - That's not a problem but I hope to see you at a future event and will keep you updated with all of the local campaigns if that is ok?

## **Example donor thank you call**

Hello, please may I speak to Claire?

Hi Claire, I am Miranda, and I am the Membership Secretary for the local Lib Dems. This is just a quick call to say thank you for your generous donation to [campaign]

Can I ask what prompted you to donate?

(Talk about reason)

As a donor, we'd love to keep you updated on what's going on locally - and we have a lot of different things coming up that you might enjoy - social events, campaigning activity and some policy discussions too.

I see that you live in Acacia Avenue. That's in East ward, and we have a coffee morning planned there in two weeks time on the 25th, on Birch Lane - if you're interested in coming along to that, just let me know.

(Record)

We also have a street stall planned in Anytown High Street on the 26th at 11am, where we are going to be giving out leaflets and balloons, and collecting petition signatures for our safer pedestrian crossings campaign. Is this something you might be interested in joining?

(Record)

OK, well if you're a bit busy the next few weeks, no problem. We work all year round and there is always something going on. We will send you occasional emails with details of the events and activities and you can join in whenever suits you.

I am always available on 01234 567 890 if I can help answer any questions you have.

Is there anything you'd like to ask now, or let me know about?

(Record)

Thanks again for your time today. I hope to meet you in person soon!

# Calling best practice

## 1. **Be happy!**

When you're speaking to members, new or old try and make sure you stay positive and upbeat. You'll usually find conversations will go more easy.

## 2. **Make sure it's convenient.**

A member, supporter or donor's time is as important as yours and you'll have a better conversation if they aren't busy or in the right headspace.

## 3. **Know what you'd like them to do.**

And don't just offer one thing. Not everyone enjoys, or can deliver leaflets - but there really is something every volunteer can do in the party.

## 4. **Be timely.**

This is especially important if you're doing welcome or thank you calls. A call within a week will seem efficient and make us look organised. A call after three months doesn't inspire confidence.

## 5. **Listen!**

Remember, you're trying to have a conversation and build a relationship, not interrogate the person you're speaking to. Make sure you're listening as much as you're talking.

# Door knocking



# The best way to get to know someone

**Personal contact is always best and going door to door is a fantastic way of welcoming new members, supporters and donors, but it will be very time consuming.**

If this is the only form of contact you have with an individual then call around and introduce yourself just as you would on the phone.

Ask at the same time for the best form of contact and leave them with your latest membership leaflet/ newsletter.

**An easier option is to double check if any members are in the area you are already canvassing and be sure to knock and just say hello and explain that you are canvassing in the area.**

Another top tip is to email them after you have canvassed if they were out to say you are sorry you missed them but that you just wanted to say hello and ask if they had any issues or concerns too.

Any door knocking should be done with a canvass card, which can be produced from Connect (or better yet, on miniVAN) so they know you have called regardless if they are in or out.

Alongside your recruitment and retention efforts, every Liberal Democrat campaigner should be looking to strengthen the skills base of their team. Every agent, candidate, campaign organiser, fundraiser and so on started somewhere and it is in our interests to help every member and helper learn new skills so that they can help strengthen the party in new ways.

## Doorknocking top-tips

### 1. **Be happy!**

When you're speaking to members, new or old, try and make sure you stay positive and upbeat. You'll usually find conversations will flow more easily.

### 2. **Use MiniVAN**

The MiniVAN app is fantastic. It's on your phone and has a map of the houses you want to visit, script and you can record the answers to questions you're asking. Plus, there's no risk of a sudden downpour making your canvassing unreadable!

### 3. **Give them a leaflet**

Make sure the leaflet has your contact details on it - but also has a fair processing notice on it. With GDPR, it's important we notify people how we'll use their data - and this is a great way of doing that.



## **Example welcome visit script**

Hi, my name is Miranda and I'm here on behalf of the local LibDems, is Claire in at the moment?

Hi Claire, it's great to meet you. As I said in my welcome email, I'm just here to say welcome to Anytown Liberal Democrats!

Can I ask what prompted you to join? Was it Brexit, or something else?

(Talk about reason)

We have a lot of different things coming up that you might enjoy - social events, campaigning activity and some policy discussions too.

Your house is in East ward, and we have a coffee morning planned there in two weeks time on the 25th, on Birch Lane, just around the corner - if you're interested in coming along to those I can send you an invite?

(Record)

We also have a street stall planned in Anytown High Street on the 26th at 11am, where we are going to be giving out leaflets and balloons, and collecting petition signatures for

our safer pedestrian crossings campaign. Is this something you might be interested in joining?

(Record)

OK, well if you're a bit busy the next few weeks, no problem. We work all year round and there is always something going on. We will send you occasional emails with details of the events and activities and you can join in whenever suits you.

I am always available on 01234 567 890 if I can help answer any questions you have.

Is there anything you'd like to ask now, or let me know about?

(Record)

Thanks again for your time today.

## **Example audit visit script**

Hello. My name is Miranda, and I'm calling on behalf of the local Liberal Democrats.

Could I speak to Claire please?

Hi Claire, I'm Miranda and I'm helping the local Lib Dems, and I thought it would be a good idea to come and visit members to, first of all, say hello.

Secondly, we would like to know how local members might want to be involved, and to ask whether there are things you would like to do, which you're not already doing.

Would it be ok to ask a few very quick questions please?

**If yes, move on**

**If no, "OK, I totally understand. Thanks for your time."**

What type of issues interest you most? Local, National - any particular policy areas?

(Record)

Please let us know of any skills, experience or qualifications you have that may be able to offer to the party.

From being an auditor to baking cakes, from public speaking to running a bookstall, every skill is useful! Is there anything that leaps to mind that you'd be happy to help us with?

(Record)

The local party holds a number of events, from our "pint and politics" evenings, where we discuss the latest political events over a drink, to cake sales to raise some funds, as well as formal dinners with guest speakers.

Would any of these interest you - or is there another kind of event you would prefer to come to?

(Record)

The Lib Dems rely on local volunteers to help us keep in touch with local people all year round, not just at election time. Would you be willing to help out, say, for an hour a month in some way?

(Record)

I expect you're familiar with our local Focus leaflets and that we like to keep you in touch with what's happening locally.

What you may not know is that these leaflets are all delivered by local volunteers who do a few up and down their road. It takes maybe an hour once a month or so, and I was just wondering if you'd be interested in giving it a try?

(Record)

Sending letters to voters is one of the most effective ways of getting our message across, but we need help putting the letters into envelopes.

Would you be willing to help with stuffing envelopes, either at home, or in a group with others?

(Record)

That's great. Whilst I'm here, is there anything else you wanted to know about the party or what we do locally?

(Listen)

Thank you so much for your time today Claire. If it's okay, I'd like to leave you with a copy of our last members newsletter - it's got a lot of useful information in it, including upcoming events.

# Mailings



# A tried and tested way to reach people

Just as we deliver leaflets and letters for campaigning with voters, we should also ensure that we send physical mailings to communication with our members and supporters.

Below are some ideas and examples.

## **Welcome to our local party letter, including contact lists**

Just as you need to be warm and friendly on the phone and via email when welcoming members, you need to ensure that your printed contact tone is the same.

## **AGM invites**

As a democratic party, we have a duty to make sure everyone knows about the next AGM. Your Annual General Meeting is one of the most important dates on the calendar – it's a chance for your members to have their say on the work that the Liberal Democrats are doing in their community, and to elect your committee members for the year ahead.

To help ensure your AGM is as brilliant as it possibly can be, LDHQ have put together a fact sheet to help you. The first page lists the various positions that exist within local party

committees, and the second page contains ten top tips on how to ensure you get the most from the occasion.

You can find the factsheet here:

[www.LibDems.org.uk/AGM-Guide](http://www.LibDems.org.uk/AGM-Guide)

## **Member newsletters**

Keeping members up to date with what is going on in the local party is very important. We need to involve members, supporters and helpers so that they feel involved and wanted.

The type of things that we should be involving them with is: inviting them to social events, introducing them to senior councillors, PPC/MP and other members.

Your regular newsletters should advertise activities both social and political, giving dates, times, a contact name, telephone numbers and email addresses.

In the newsletter, you can ask people to help with running social events and get them involved in campaigning. Don't be scared to ask!

We recommend that you send a newsletter on at least a quarterly basis, if not more frequently. We also recommend that you send it not just to members but to registered supporters, helpers, friends, donors and poster sites. Keeping in touch will help you get them more involved both socially and politically .

Here is an example: [www.LibDems.org.uk/Members-Newsletters](http://www.LibDems.org.uk/Members-Newsletters)



HQ also produce a quarterly template newsletter for local parties to adapt and also offer a bulk buy deal on them, allowing you to produce and send them to your members at a discounted rate.

## **E-newsletters**

E-newsletters can be much more regular but a member's email should be at the very least sent once a month, packed with events, news and details of how to help.

The principles are to:

1. Make it clear what events you have coming up
2. Update people on campaigns you're running
3. Let people know any decisions being made at the County / Town Hall
4. Allow people to give their feedback
5. Ensure everyone knows how to contact the team and get involved

## **Post isn't dead...**

As more and more companies go all-digital, people are getting less and less post, making getting a letter all the more novel an experience.

That's especially true of younger people and it can be a really valuable way to deliver your message to people and get their attention, in a way you might not be able to online.

# Events



# How you build a community

**Running good regular social events is vital for a local party of any size.** They build team spirit, keep members involved and updated with the latest news. The most effective teams are the ones that have fun together.

Try to think about the events and activities that you enjoy most in your local party. Maybe it's the Quiz nights, or policy discussion evenings. Maybe it's holding street stalls or canvassing, or even the cardio workout of delivering leaflets.

**Odds are that your favourite activities are not the AGM or the local party executive meetings!**

And yet lots of local parties invite new members to those, rather boring, meetings.

Inevitably what happens is that the keen new member comes along, is either bored, horrified or depressed and leaves, never to be seen again.

One in a thousand members will love these events, and they are important parts of how we run ourselves as a party.

But for a new member who doesn't understand the procedures but just wants to get out there and change their area for the better, these meetings can seem restrictive, meaningless and dull.

You can make your AGM more exciting of course.

Have a good guest speaker, lay on some food and drinks (but remember you should not charge ticket prices for an AGM, any member should be able to come).

Try to make the event fun, and then put effort into inviting members to come along. But this is still not always a great “first event” for a newly active member, nor are they a great event to invite supporters to in the hope they may become members!

### **The best kinds of activity and events for newly active members are social.**

That means that they are able to talk to other members and feel part of a group. This could be a campaign focused activity, like running a street stall, attending a demonstration or going out and knocking on doors.

Be sure to arrange a way for people to chat about the event afterwards, like going to a coffee shop, a pub or an activist’s home. It gives new members a chance to ask questions about the campaigning, share their wacky story of someone they spoke to on the doorstep, and cement a sense of shared purpose.

If you’re organising a training session for your local team, that is a great opportunity to engage some newer people.

An alternative set of activities would be more purely social - a “pizza and politics” discussion evening, or a fundraising dinner or a coffee morning.

**The key is to make sure that the event is one that has a lot of interaction, so that the newly active member can meet other Lib Dems, ask questions and start to feel a part of something.**

**It is not just a question of making money, but to also socialise.**

If you plan an event which relies on your members, supporters and donors to make it, it is essential to publicise the event frequently, widely and a long time in advance, particularly if you are selling tickets to the event.

You should put lots of effort into selling tickets in advance.

Alongside your recruitment and retention efforts, every Liberal Democrat campaigner should be looking to strengthen the skills base of their team.

Every agent, candidate, campaign organiser, fundraiser and so on started somewhere. It is in our interests to help every member and helper learn new skills so that they can help strengthen the party in new ways.

Make the most of training opportunities – at regional and national conferences, at ALDC events, and through the many campaign guides and information available.

**Use your imagination too - there are plenty of seasonal events you can theme an event around, from the Lunar New Year to Halloween. But also think of other ways to bring members together.**

Sheffield Lib Dems started “Little Lib Dems” events for parents with babies and toddlers to go to a member’s house, kids play together while adults discuss politics over a cup of tea.

Cheadle Lib Dems have Lib Dem Dog Walks - come for a walk with your dog and chat about politics as you walk.

There’s loads of other ways you can bring members together - knitting and sewing groups, garden parties, wine tasting evenings, cheese tasting evenings, dessert parties - anything that allows people to mingle and chat can become a Lib Dem event.

The other temptation of course, is to immediately ask people to deliver leaflets.

Delivery is such an important part of our campaigning effort! But actually, because there is no interaction, no-one to ask if you’re doing it right, no-one to chat with, **it is not a good first activity.**

Wait until a new member is regularly attending events and other campaign activities and then ask them to take on a delivery round - or even better, join a delivery team.

By matching people up into small teams and asking them to deliver rounds together, they can make friends and get more leaflets delivered. This will breed much greater long term success.

You can find out about events other Local Parties are organising at: [www.LibDems.org.uk/Events](http://www.LibDems.org.uk/Events)

There are instructions about how to add your event here: [www.LibDems.org.uk/Events-Help](http://www.LibDems.org.uk/Events-Help)

## **A few examples of great events**

### **Little Lib Dems**

Sheffield Lib Dems run Little Lib Dems, an event for parents with babies and toddlers.

Every few weeks, they go to a member's house, the kids play on the floor while adults discuss politics (and other things) over a cup of tea.

### **Lib Dem Pastry**

Edinburgh North & Leith Lib Dems have found great success with their Lib Dem Pastries. Usually held on a Saturday, they'll reserve some space in a local coffee shop and members meet up, talk politics, drink tea and coffee and eat pastry.

# Going the extra mile





# What to do next

It can be easy to fall into a rut when you're communicating with members, supporters and donors.

But if you only communicate in one way, you will only get through to one group of people.

**If you want to engage more members, the absolute best thing that you can do is to put more time into your communication.**

Ask other people to join you in this effort so that you share the workload - because this is time consuming.

But it's one of those tasks that for every hour you put in, you can spur three other people (or even more!) into giving an extra hour of their time too.

Here are some examples of what you could do to go the extra mile. All of these have been tried and found to be helpful by Lib Dem local parties.

## **Give all the details and make it easy for a total newcomer**

Imagine that you just moved into your town last week, and the first thing you are going to do is come to this Lib Dem drinks event.

You know it's taking place at the Red Lion pub in the town centre at 7pm - but where exactly is the Red Lion? Where should you park? What's the safest way to walk from the car park to the pub? Where is the nearest bus stop and what number bus do I need? When I go into the pub, which part of it will you be in? How will I recognise any of you?

Give people all the details they might want - send an attachment with the email, or add links into the email text, or print them on the back of the invite. Then make sure that you mark yourselves out to be easy to find for someone who has never met you before.

## **Make sure that people have a number they can call**

All members should have the name and number of someone they can call with any questions.

This could be the membership secretary, PPC, local Councillor, Council candidate or any other established figure.

Just make sure that it's someone who will answer the calls, respond to messages that get left and that they have enough experience to be able to answer the easy questions.

## Let people participate remotely

It is easier than ever before to let people participate remotely in your event.

Let people dial into meetings, or use FaceTime, Skype, Google Hangouts or any other video conferencing tool to help people attend events.

This may mean that you can then include that brilliant single parent who can't come to evening meetings because of childcare, or the talented young/old/disabled activist who can't physically travel to the venue but still has skills to contribute.

If you find that lots of people want to take part like this, consider whether some meetings or events could even take place online entirely - for example, a Google Hangout at a particular time rather than meeting in a pub.

# Remote participation

It's never been easier to let people participate in things remotely. There are loads of free tools (most of which we have on our phones and tablets already) that will let people participate remotely. Here are a few of them:

- Google Hangouts
- Zoom
- Facetime
- GoToMeeting
- Skype
- And many more!

## **When organising a fundraiser, send fun, posted invites that are handmade.**

For example, for a Christmas Party, you could print snowman shapes onto card, with the event details on his tummy.

Cut the snowman shapes out and use glue and glitter to give them sparkly top hats.

Draw his eyes and smile with a black felt tip and his carrot nose with an orange felt tip.

This can be done by members who have kids over a weekend, or by a group of glitter loving adults and a bottle of wine in someone's kitchen.

Other ideas are witch hats, pumpkins or ghosts for autumn/Halloween events, gold pen scroll swirls hand-drawn onto President's Dinner invites, a felt pipe cleaner shaped into a question mark on an invite to a Quiz Night, even just photographs of previous events made into a collage greetings card.

Whatever you can imagine that will make your invite stand out, will make people smile and show that you thought this was important enough to spend time doing it.

The snowman cut out glitter topped invite, for example, gave that local Party their best ever attendance at a winter event, making a £600 profit.

### **Call everyone and offer to arrange a lift for them**

Follow up your email or posted invite with a personal phone call.

When someone takes the time to call you, it feels like they really want you to come. We recommend offering lifts to people too. Making that effort can help those who are younger, older, from poorer households, and those who have mobility restrictions.

It's also just a nice gesture! In practice most people will make their own way there, and there will probably only be a handful who do ask for someone to drive them.

Then ask other trusted members who live nearby if they would pick that other member up. Just keep really good records of who is collecting who, and make sure that they all know who they are meeting with.

**Use your common sense if a member is clearly vulnerable** - or might be uncomfortable in an unfamiliar car.

A member who is under 18 years old, or a young woman for example (you can get a list of under 18s from Lighthouse) should only be given a lift by someone you trust completely, and ideally who has been DBS checked.

### **Use your newsletters**

When you post Members' newsletters out, make sure you are trumpeting your local successes.

Have any teams been going out campaigning recently? Make sure there is a story and picture about that, explaining the activity they were doing - for example, what does canvassing mean, and how do you do it?

Whenever you have a social event or fundraiser, let people know how much money was raised, and tell everyone how much fun it was.

## **Use Social Media**

It's a really good idea to set up a Virtual Campaign HQ group on Facebook.

This lets members, supporters and donors keep in touch with you and helps them feel like part of your team.

By allowing non-members to come into your circle and be supportive, you can actually help engage people who might become deliverers, poster sites and other useful things - and they may also decide in time to join the Party too!

Keep your posts in there positive, regular and always encouraging action.

And remember, whatever you do on social media is public - so don't put anything on there that you wouldn't mind winding up in the press!

# Is it working?





# How do you know if what you are doing is working?

It's a really good idea to set yourself some things to measure. That way, you can see what progress you have made!

What you should track will be different for each local party. It will depend on which techniques you're going to try out and what you're hoping to achieve.

## ***Some ideas for what you could measure include:***

- How many members are coming to the social events you are holding
- How many people are donating to your appeals for money
- How many new members you are recruiting
- What percentage of members are renewing each quarter
- How many deliverers do you have
- How many people are going out in canvass teams
- How many people "like" your page on Facebook
- How many people are in your Virtual Campaign HQ on Facebook
- How many people interact regularly on your Facebook members' group
- How many people share your posts on Facebook, or retweet on Twitter?

It's also important to take notice of any feedback you get.

It is natural that you will have a small percentage of people who don't like something - a few people will always remove their name from an email list over a year for example, or remove their "like" from your Facebook page.

Very often it just means they didn't like that method of communication - they have too many emails or too many Facebook updates.

Most of the time they still like the Party! But keep an eye on the negatives and if they get too high, ask some people if they would tell you more about what has put them off.

If anyone does directly complain about something you have done, listen carefully.

It can be very hurtful when we have tried hard to do something good to hear criticism, but it can be extremely valuable.

**Listen particularly carefully for anything that is excluding certain kinds of people - diversity and inclusion should be important to all Liberal Democrats.**

One complaint does not mean you ditch the activity - but consider whether others might share that opinion and if you could adapt and improve things.

If you find that your approach is working OK, but needs a few tweaks, or if you have not quite got it right yet, please keep trying.

There is no magic wand that will work for everyone all the time, but if you're listening, communicating and trying to make experiences rewarding for members, you should find success eventually. And when you do, the reward is well worth it.

## **Be open about if things are working**

The very best local parties do three things really well:

### **1. Set clear objectives**

It's all well and good keeping track of if things are working, but without knowing what success looks like, it's hard to tell if your effort has been worth it. Set clear objectives and report back how you're doing against them.

### **2. Allow people to fail**

Sometimes things don't work - and that's okay! The best local parties create a culture where failure is okay and used as a learning experience.

### **3. Listen to feedback**

If something isn't working, members and supporters will often tell you exactly why it isn't - so you can improve in future!

# Frequency



# How much is too much?

In this guide, there's a lot of suggestions of how you can engage your members and we want you to try as many of them as you can!

Whether you're trying to build a local party to win a first seat on a Council, or win an MP, they will make a huge difference to the willingness of your members to help and your ability to win.

But trying to do them all simultaneously, might not be the best plan!

To help you get the balance right, we've added some suggested member engagement schedules to this section

## Are we sending too many emails?

At some point during this, you might get a message from a member saying that they're getting too many emails, or letters, or can't come to an event.

It's also worth remembering, different people will have different tolerances for how much communication is too much - and often people mean they're getting too many emails they aren't interested in when they say this.

If you get messages like this, try and ensure you update their records to reflect their wishes - so you might set up a list of people who get fewer emails. Or a list of people who you don't ask to volunteer or donate.

Those members who have complained will have a much better experience as a result - because we'll have listened and acted on their feedback.

# Example 1 - a small local party

Activity	Frequency	Audience
<b>Members Newsletters</b>	Quarterly	Members, Supporters & Donors
<b>Email Updates on Local Issues / Politics</b>	2 times a month	Everyone
<b>Email Invites to Events</b>	2 times a month	Members, Supporters & Donors
<b>Local Events</b>	1-2 events a month	Members, Supporters & Donors
<b>Welcome Calls to members &amp; supporters</b>	Weekly	New Members & Supporters
<b>Welcome Emails to new members &amp; supporters</b>	Weekly	New Members & Supporters
<b>Volunteer Audit</b>	Annually	Members, Supporters, Volunteers & Donors
<b>Connect Matching</b>	Weekly	Members & Supporters
<b>VHQ Updates</b>	Twice a week	Members, Supporters, Volunteers & Donors
<b>Campaigning Events</b>	1-2 events a month	Members, Supporters & Volunteers

# Example 2 - a large local party

Activity	Frequency	Audience
<b>Members Newsletters</b>	Quarterly	Members, Supporters & Donors
<b>Email Updates on Local Issues / Politics</b>	2 times a month	Everyone
<b>Email Invites to Events</b>	3-4 times a month	Members, Supporters & Donors
<b>Local Events</b>	1-3 events a month, per branch	Members, Supporters & Donors
<b>Welcome Calls to members &amp; supporters</b>	Weekly	New Members & Supporters
<b>Welcome Emails to new members &amp; supporters</b>	Weekly	New Members & Supporters
<b>Volunteer Audit</b>	Annually	Members, Supporters, Volunteers & Donors
<b>Connect Matching</b>	Weekly	Members & Supporters
<b>VHQ Updates</b>	Twice a week	Members, Supporters, Volunteers & Donors
<b>Campaigning Events</b>	3-4 events a month	Members, Supporters & Volunteers

# Tools





# What you need to do your job

The party uses a few tools and has a lot of resources available to help.

So many in fact, that it can be hard to know what's relevant, how it's useful to you and what you should prioritise.

To help, we've pulled together a comprehensive list of all the tools listed in this guide, along with an explanation of what we use them for and a list of all the online training and resources available to you.

## Lighthouse

### What do we use it for?

Lighthouse is a tool for helping to manage your local party. It will help you manage members, supporters and donors, update details HQ knows about your local party, manage your executive and candidates, manage candidate approval processes, help you stay compliant with electoral law and record election expenses.

### Where can I find it?

You can access Lighthouse by going to <https://Lighthouse.LibDems.org.uk> or [www.LibDems.org.uk/Lighthouse](http://www.LibDems.org.uk/Lighthouse) - you'll find a login link at the bottom of that page.

## How do I get access?

You should speak to your local team to see if anyone already has access first. Each local party gets two superusers, who you can appoint by emailing [Membership@LibDems.org.uk](mailto:Membership@LibDems.org.uk) and super-users can set up an unlimited number of users.

If you're not sure who your superusers are, just email [Membership@LibDems.org.uk](mailto:Membership@LibDems.org.uk) and we'll be happy to tell you.

## Where can I find training?

You'll find the full complement of Lighthouse training at [www.LibDems.org.uk/Lighthouse](http://www.LibDems.org.uk/Lighthouse), including pre-recorded and upcoming webinars, user guides, a manual and geek sheets.

# Connect

## What do we use it for?

Connect is used to contact voters, by phone or in person, contact members, supporters, volunteers and donors and record accurate, up to date information about their volunteering interests.

## Where can I find it?

You can access Connect by going to <https://Connect.LibDems.org.uk>

## How do I get access?

You should speak to your local team to see if anyone already has access first. Your local party should have a Constituency Connect Manager who can give people access.

If you're not sure who your Connect Manager is, just email [Connect@LibDems.org.uk](mailto:Connect@LibDems.org.uk) and we'll be happy to tell you.

## **MyVoters**

MyVoters is the part of Connect where details about people on the electoral roll are kept. Many members and volunteers will also be found in here. If you're running an election campaign, this is the place you'll spend the most time.

## **MyCampaign**

MyCampaign is the part of Connect where details of volunteers and what they're interested in should be kept. People in MyCampaign don't have to be in MyVoters and it should match the data in Lighthouse. You might also have historic information on people's volunteer interests in there.

## **MiniVAN**

MiniVAN is a canvassing app that is part of Connect. It allows you to load a list of people onto your phone, record their responses to conversations and then upload it to the live system. It's the best way to go door knocking.

## **Virtual Phonebanks**

Connect's Virtual Phonebank function is the quickest and easiest way to call members and volunteers. It gives you one person at a time, the script and all of the information you'd need to know about them. You can also use it to record the results of your conversation before moving onto the next person.

## Where can I find training?

You'll find the full complement of Connect training at [www.LibDems.org.uk/Oskar-Connect](http://www.LibDems.org.uk/Oskar-Connect)

## Nationbuilder

### What do we use it for?

Nationbuilder is used to provide action focused, branded websites with very little setup needed.

It is also used to send emails to members, supporters, donors, volunteers and people who sign up for our emails. Nationbuilder also has an easy to use set of online fundraising tools.

### Where can I find it?

You can see an example of a Nationbuilder site at [www.LibDems.org.uk](http://www.LibDems.org.uk) - you'll need to set up your own account to get access and you'll then get a custom link to login.

### How do I get access?

If your local party uses Nationbuilder, a local party officer should have access. You should be able to check what kind of website your local party uses on Lighthouse.

If your local party would like to set up Nationbuilder, just email [Digital@LibDems.org.uk](mailto:Digital@LibDems.org.uk)

### Where can I find training?

You'll find the full complement of Connect training at [www.LibDems.org.uk/Oskar-Nationbuilder](http://www.LibDems.org.uk/Oskar-Nationbuilder) and there's extensive

documentation on Nationbuilder's site as well

<https://Nationbuilder.com/>

## **Prater Raines**

### **What do we use it for?**

Prater Raines is a website developer who have worked with the Lib Dems since 2002 supplying a variety of website and online tools, including hundreds of local Lib Dem websites.

Their most known service is their "Foci2" website and email platform specifically for Liberal Democrat campaigning, local parties, regions, SAOs / AOs etc. It combines branded Liberal Democrat websites with an email campaign system to send emails to members, supporters, donors, volunteers and other contacts. All support including domain name registration, donation accepting tools (which allow you to raise money online), free help and support are included in their £17 + VAT per month fee.

Prater Raines have also developed a number of other bespoke websites and systems for the Lib Dems, including Party membership management system Lighthouse, Lib Dem Image & Lib Dem Directory.

### **Where can I find it?**

There is more on the Prater Raines Foci2 service at <https://PraterRaines.co.uk/Liberal-Democrats/> and Prater Raines generally at <https://PraterRaines.co.uk/>

## How do I get access?

You can get in touch with Prater Raines at [Info@PraterRaines.co.uk](mailto:Info@PraterRaines.co.uk) 0345 363 7163.

## Where can I find training?

Prater Raines attend all Federal Conferences and a number of Regional conferences with support, advice, training and new site set-ups. They also offer phone and email support through office hours, and bespoke training sessions by agreement. There is a Foci2 Facebook support group at <https://www.Facebook.com/Groups/Foci2/>

# Mailchimp

## What do we use it for?

Mailchimp is used to send emails to members, supporters, volunteers and donors. Mailchimp is one of the easiest email tools to use, but doesn't come with Liberal Democrat branded templates.

## Where can I find it?

You just need to go to [www.Mailchimp.com](http://www.Mailchimp.com)

## How do I get access?

If your local party uses Mailchimp, then a local party officer should be able to give you access.

If you don't, you can sign up at [www.Mailchimp.com](http://www.Mailchimp.com) - though you'll need to complete some extra data protection

authorisation steps if you want to use it, details of which can be found here: [www.LibDems.org.uk/Mailchimp-Authorisation](http://www.LibDems.org.uk/Mailchimp-Authorisation)

### **Where can I find training?**

Mailchimp has an extensive library of training and documentation that should guide you through all the features: <https://Mailchimp.com/Resources/>

## **Directory**

### **What do we use it for?**

Directory is a way to record party groups - from Facebook groups to party bodies. It's one of the easiest ways for members, new and old to connect with likeminded members in person and online.

### **Where can I find it?**

You can find Directory at [www.LibDemDirectory.org.uk](http://www.LibDemDirectory.org.uk)

### **How do I get access?**

Any member can submit items to Directory and they'll be checked by the HQ team before publication.

## **Facebook**

### **What do we use it for?**

Facebook is one of the main ways that Liberal Democrat activists communicate. There are more than 150 Lib Dem themed Facebook groups with active communities.

## Where can I find it?

You can find Facebook at [www.Facebook.com](http://www.Facebook.com) - and you can also find a list of key Facebook groups in the resources section of this document. You can also find a list of key Facebook groups in the same section.

## How do I get access?

You'll need a Facebook account to get involved, which you can sign up at [www.Facebook.com](http://www.Facebook.com) and many Lib Dem Groups will ask you to prove that you're a member before they let you join.

# Twitter

## What do we use it for?

Twitter is used mainly for publishing news, views and debating with other members. Many candidates use it to get noticed during elections.

## Where can I find it?

You can find Twitter at <https://Twitter.com/>

## How do I get access?

You'll need a Twitter account to get involved, which you can sign up at <https://Twitter.com/>



# Typeform

## What do we use it for?

Typeform is used for very user friendly surveys - and can be used to gather data on members, supporters, donors or the general public.

## Where can I find it?

You can find Typeform at: [www.Typeform.com](http://www.Typeform.com)

## How do I get access?

If your local party uses Typeform, then a local party officer should be able to give you access.

If you don't, you can sign up at [www.Typeform.com](http://www.Typeform.com)

## Where can I find training?

Typeform have extensive user guides and documentation on their website, all of which can be found here:

<https://Help.Typeform.com/HC/EU-US>

# SmartSurvey

## What do we use it for?

SmartSurvey is used for more complicated surveys - and can be used to gather data on members, supporters, donors or the general public.

## Where can I find it?

You can find SmartSurvey at [www.SmartSurvey.co.uk](http://www.SmartSurvey.co.uk)

## How do I get access?

If your local party uses SmartSurvey, then a local party officer should be able to give you access.

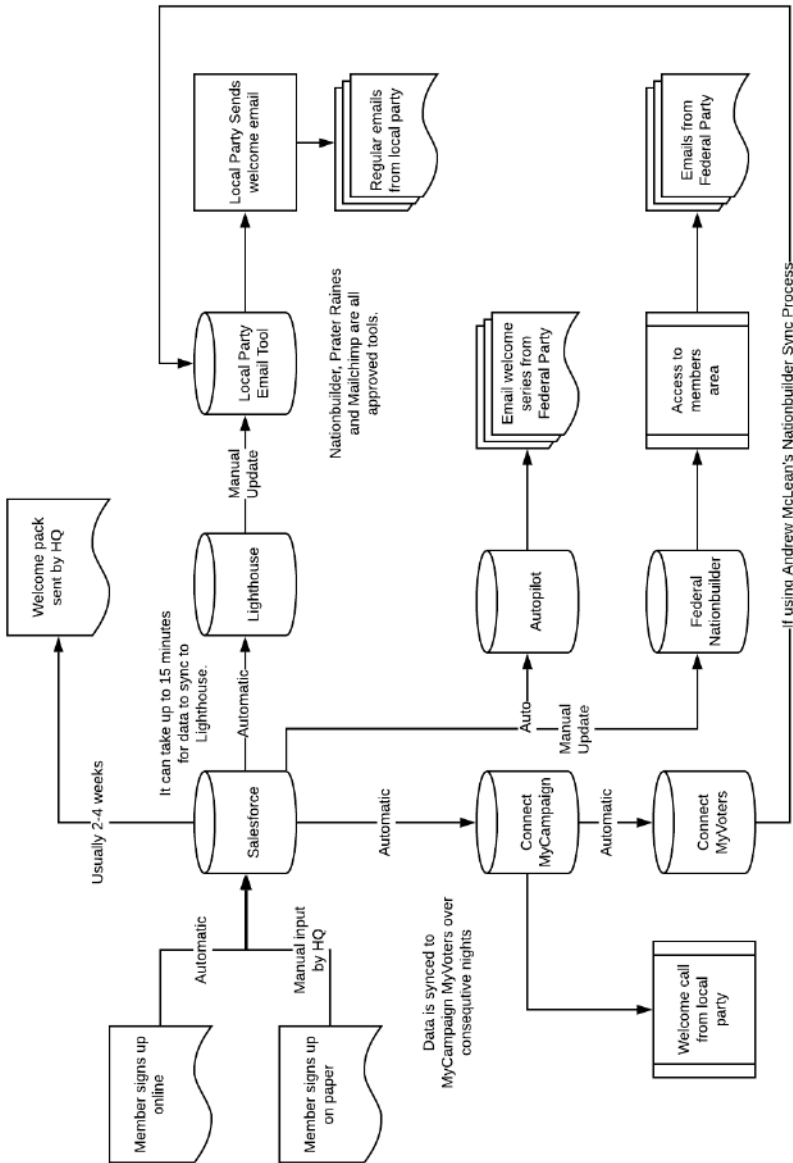
If you don't, you can sign up at [www.SmartSurvey.co.uk](http://www.SmartSurvey.co.uk)

## Where can I find training?

SmartSurvey have extensive user guides and documentation on their website, all of which can be found here:

[www.SmartSurvey.co.uk/Resources](http://www.SmartSurvey.co.uk/Resources)

# New joiner data flow



When a new member or supporter joins, this is the process their data goes through to get to all of the Liberal Democrat systems and to ensure they get an efficient welcome.

# Resources



# Where to get help

## Lib Dem Learning

### What will it help with?

Lib Dem Learning contains a massive array of training on skills, actions and software programs and will help you get up to speed with how to do any task you might need to know as a Lib Dem Volunteer.

### Where can I find it?

Just go to [www.LibDems.org/Training](http://www.LibDems.org/Training) - you'll need an account to get into the training.

### How do I get access?

Every member has an account created for them automatically and it'll be associated with your membership email, so you can try resetting your password. If that doesn't work, you can email [Help@LibDems.org.uk](mailto:Help@LibDems.org.uk)

# Membership Engagement Guide

## What will it help with?

The membership engagement Google Drive contains a more in depth descriptions of some of the processes mentioned in this document, as well as resources and examples of membership engagement projects other local party officers have done.

## Where can I find it?

You can find the Membership Engagement guide at [www.LibDems.org.uk/Membership-Engagement](http://www.LibDems.org.uk/Membership-Engagement) - you'll need an account to get into the training.

## How do I get access?

Every member has an account created for them automatically and it'll be associated with your membership email, so you can try resetting your password. If that doesn't work, you can email [Help@LibDems.org.uk](mailto:Help@LibDems.org.uk)

# Campaigners Drive

## What will it help with?

The Campaigners Drive contains more than 8 years of literature templates, with everything from canvassing leaflets and direct mail to recruitment resources and membership newsletter.

## Where can I find it?

You'll need to be given access to the drive by the HQ Team.

## How do I get access?

You need to email [Content@LibDems.org.uk](mailto:Content@LibDems.org.uk) and ask to be added to the Campaigners Drive.

## **GDPR Field Guide**

### **What will it help with?**

The guide will help you make sure you remain compliant with UK Data Protection Legislation and ensure you don't get the party into hot water with the Information Commissioner's Office.

### **Where can I find it?**

You can find the GDPR guide at [www.LibDems.org.uk/GDPR](http://www.LibDems.org.uk/GDPR) - you'll need an account to get into the training.

### **How do I get access?**

Every member has an account created for them automatically and it'll be associated with your membership email, so you can try resetting your password. If that doesn't work, you can email [Help@LibDems.org.uk](mailto:Help@LibDems.org.uk)

## **Compliance Guide**

### **What will it help with?**

The Compliance guide will help you and your team comply with the Political Parties, Elections and Referendums Act (PPERA) and other key pieces of election law.

### **Where can I find it?**

You can find the Compliance guide at [www.libdems.org.uk/Oksar-Compliance](http://www.libdems.org.uk/Oksar-Compliance) - you'll need an account to get into the training.

### **How do I get access?**

Every member has an account created for them automatically and it'll be associated with your membership email, so you can try resetting your password. If that doesn't work, you can email [Help@LibDems.org.uk](mailto:Help@LibDems.org.uk)

## **Software training**

### **What will it help with?**

The party's software training includes guidance on how to use Lighthouse, PagePlus, Connect, and Nationbuilder.

### **Where can I find it?**

You can find the Software training guide at [www.libdems.org.uk/Lib-Dem-Learning](http://www.libdems.org.uk/Lib-Dem-Learning) - you'll need an account to get into the training.

### **How do I get access?**

Every member has an account created for them automatically and it'll be associated with your membership email, so you can try resetting your password. If that doesn't work, you can email [Help@LibDems.org.uk](mailto:Help@LibDems.org.uk)



# Party Officer Guidance

## What will it help with?

The Party Officer guidance has an introduction to each of the key local party roles, including key responsibilities, signposting to training and advice and hints from experienced officers who've done the job before. It also gives people interested in taking on one of these roles a clearer idea of the commitment needed.

## Where can I find it?

You can find the Party Officer guidance at [www.LibDems.org.uk/Local-And-Regional-Officer-Guidance](http://www.LibDems.org.uk/Local-And-Regional-Officer-Guidance) - you'll need an account to get into the training.

## How do I get access?

Every member has an account created for them automatically and it'll be associated with your membership email, so you can try resetting your password. If that doesn't work, you can email [Help@LibDems.org.uk](mailto:Help@LibDems.org.uk)

# Style Guide

## What will it help with?

The Party Style Guide will help you make sure anything you produce is using the latest party branding. It also gives you a downloadable set of resources, including official fonts and logos to make designing everything from leaflets to emails easier.

## Where can I find it?

You can find the style guide at [www.LibDems.org.uk/Styleguide](http://www.LibDems.org.uk/Styleguide)

### **How do I get access?**

You simply have to go to the web address above and download the files!

## **AdLib**

### **What will it help with?**

Ad Lib is the party's news service. It has all the latest news and information from Westminster and beyond. Key party announcements are also made on AdLib. It also gives you great social media content for your local party and Virtual HQs.

### **Where can I find it?**

You can find the AdLib Blog and the latest version of the magazine at [www.LibDems.org.uk/AdLib](http://www.LibDems.org.uk/AdLib)

### **How do I get access?**

You just have to go to the web address above.

## **The HQ Team**

### **What will we help with?**

The team at Lib Dem HQ can help answer any queries not answered by all of the resources above!

### **Where can I find you?**

You can reach the HQ team by email or by phone.

## How do I get access?

You can email the team - and we have a number of email addresses you can use:

[Help@LibDems.org.uk](mailto:Help@LibDems.org.uk) - is the general inbox for any queries not covered by the below options.

[Membership@LibDems.org.uk](mailto:Membership@LibDems.org.uk) - is the general inbox for local party officer queries.

[Compliance@LibDems.org.uk](mailto:Compliance@LibDems.org.uk) - is the hotline for compliance issues

[Candidates@LibDems.org.uk](mailto:Candidates@LibDems.org.uk) - is the best place to contact the candidates team

[Diversity@LibDems.org.uk](mailto:Diversity@LibDems.org.uk) - is the best place to contact if you have queries about diversity and inclusion

[Data.Protection@LibDems.org.uk](mailto:Data.Protection@LibDems.org.uk) - is the best place to contact if you have a data protection issue

[Standards@LibDems.org.uk](mailto:Standards@LibDems.org.uk) - is the best place to contact if you have a disciplinary issue or complaint

You can also call the HQ team on 020 7022 0988, we're open 9.30am to 5pm, Monday to Friday.

## **Lib Dem Image**

### **What will it help with?**

Lib Dem Image are your one stop shop for Lib Dem branded merchandise, including clipboards, rosettes and even roller banners.

### **Where can I find it?**

You just have to go to [www.LibDemImage.co.uk](http://www.LibDemImage.co.uk)

### **How do I get access?**

Just go to the website above and you can place an order. You can also call the friendly team at Lib Dem Image who will be happy to help.

## **Press releases**

### **What will it help with?**

The party has a press release email list that local teams can sign up to. It'll mean you get national press releases in your inbox and you'll also get regular template press releases that you can send to the local press.

### **Where can I find it?**

Once you've signed up, you'll find them in your inbox.

### **How do I get access?**

You just have to email [Press@LibDems.org.uk](mailto:Press@LibDems.org.uk) and the team will be happy to add you.

# Facebook Groups

## What will it help with?

There are Facebook groups for almost every topic in this guide. Most of the Facebook groups are moderated spaces where local party officers and other key volunteers can share best practice, ask questions and help each other to solve problems.

They aren't usually politics discussion groups - though there are some that do offer that.

## Where can I find them?

Most Facebook groups will be listed in the party Directory - but we've also included a link of the ones related to this guide here:

### **Lib Dem Local Party Officers**

[www.Facebook.com/Groups/LibDemLocalPartyOfficers/](http://www.Facebook.com/Groups/LibDemLocalPartyOfficers/)

### **Lib Dem Campaigners**

[www.Facebook.com/Groups/LibDemCampaigners](http://www.Facebook.com/Groups/LibDemCampaigners)

**Lighthouse Users** [www.Facebook.com/Groups/LDMembership](http://www.Facebook.com/Groups/LDMembership)

**Connect Users** [www.Facebook.com/Groups/ConnectUsers](http://www.Facebook.com/Groups/ConnectUsers)

### **Lib Dem Nationbuilder Users**

[www.Facebook.com/Groups/LibDemNBUsers](http://www.Facebook.com/Groups/LibDemNBUsers)

## **Lib Dem Digital Campaigning Forum**

[www.Facebook.com/Groups/LibDemDigitalForum](http://www.Facebook.com/Groups/LibDemDigitalForum)

## **Prater Raines FOCI CMS Users**

[www.Facebook.com/Groups/Foci2](http://www.Facebook.com/Groups/Foci2)

## **Online Champions**

[www.Facebook.com/Groups/OnlineChampions/](http://www.Facebook.com/Groups/OnlineChampions/)

### **How do I get access?**

Each group has different rules for who can join them, but most will require you to answer a few questions before entering.

## **Flickr**

### **What will it help with?**

Flickr contains hundreds of photographs of Liberal Democrat Parliamentarians, campaigners and campaigns, as well as graphics for use on social media.

### **How do I get access?**

Anyone can access the HQ Flickr account and all of the photos on there can be used, rights free, for any purpose.

### **Where can I find it?**

You can find the Lib Dem Flickr at:

[www.Flickr.com/Photos/Libdems](http://www.Flickr.com/Photos/Libdems)

# Vimeo

## What will it help with?

Vimeo has a library of hundreds of Liberal Democrat videos and animations for literally any purpose you might need.

All of the videos can be downloaded so you can re-upload them to your social media channels.

## How do I get access?

Anyone can access the Vimeo account and all of the videos can be downloaded and used by any Liberal Democrat campaigner. You're usually best off downloading them and reposting them to your social media channels, but if you're wanting to display them on a website, Vimeo also has a very good embed function.

## Where can I find it?

You can find the Lib Dem Vimeo at <https://Vimeo.com/LibDems>

# Jargon





# Party terms explained

## AGM

Annual General Meeting - every local party is obligated to have an AGM each autumn/winter to elect the local party Executive Officers.

## Connect

Connect is the cloud based database we use to store information about voters. It is updated with the most recent copies of the electoral register for our area and overlaid with the answers to questions that are asked by our voter contact teams.

## GDPR

GDPR, or more wordily known as the EU's General Data Protection Regulations are being brought into British law. GDPR represents a huge challenge to the Party and means we must meet higher standards in how we gather, store and use Information.

There will also be a need to thoroughly vet the suppliers and systems providers we use to ensure they meet the standards as well. This legislation came into force on Friday 25th May 2018 and carries huge fines for breaches.

## ICO

The Information Commissioner's Office. The UK's independent authority set up to uphold information rights in the public interest, promoting openness by public bodies and data privacy for individuals.

## Imprint

A legal necessity, the imprint is a wording which identifies the people responsible for print and publication of a leaflet or other publication. Everything you print should carry an imprint, at all times of year - but especially at election times.

You should use the following template wording for your imprint:

Printed by [name of printer, address of printer]. Published and promoted by [name of agent] on behalf of [name of candidate] (Liberal Democrats), both at [office address used in appointment of agent form].

## Lib Dem Learning / OSKAR

The party's online training website, with information and tutorials. Sits behind the party member login on

[www.libdems.org.uk](http://www.libdems.org.uk)

## **MDO**

MDO is a Membership Development Officer. They have responsibility for developing and growing your local team. This is a position often elected at the Constituency AGM.

## **Lighthouse**

A database that brings together all your member, supporter and donor information in a single, integrated platform. It contains details like renewal dates, addresses, emails and phone numbers.

## **TPS**

The Telephone Preference Service (TPS) is a free service run by the Direct Marketing Association (DMA). It stops your telephone number being available to organisations, including charity and voluntary organisations, who may telephone you with sales or marketing calls. Lib Dem campaigners must remove TPS registered numbers who have not given permission to campaigners to call them.

# Good luck!

We hope you've found this guide useful. Good luck in your events and engagement projects! If you have any good success stories to share, or other brilliant engagement ideas, please share them with us on Facebook in the Membership Officers & Lighthouse Users Facebook group!

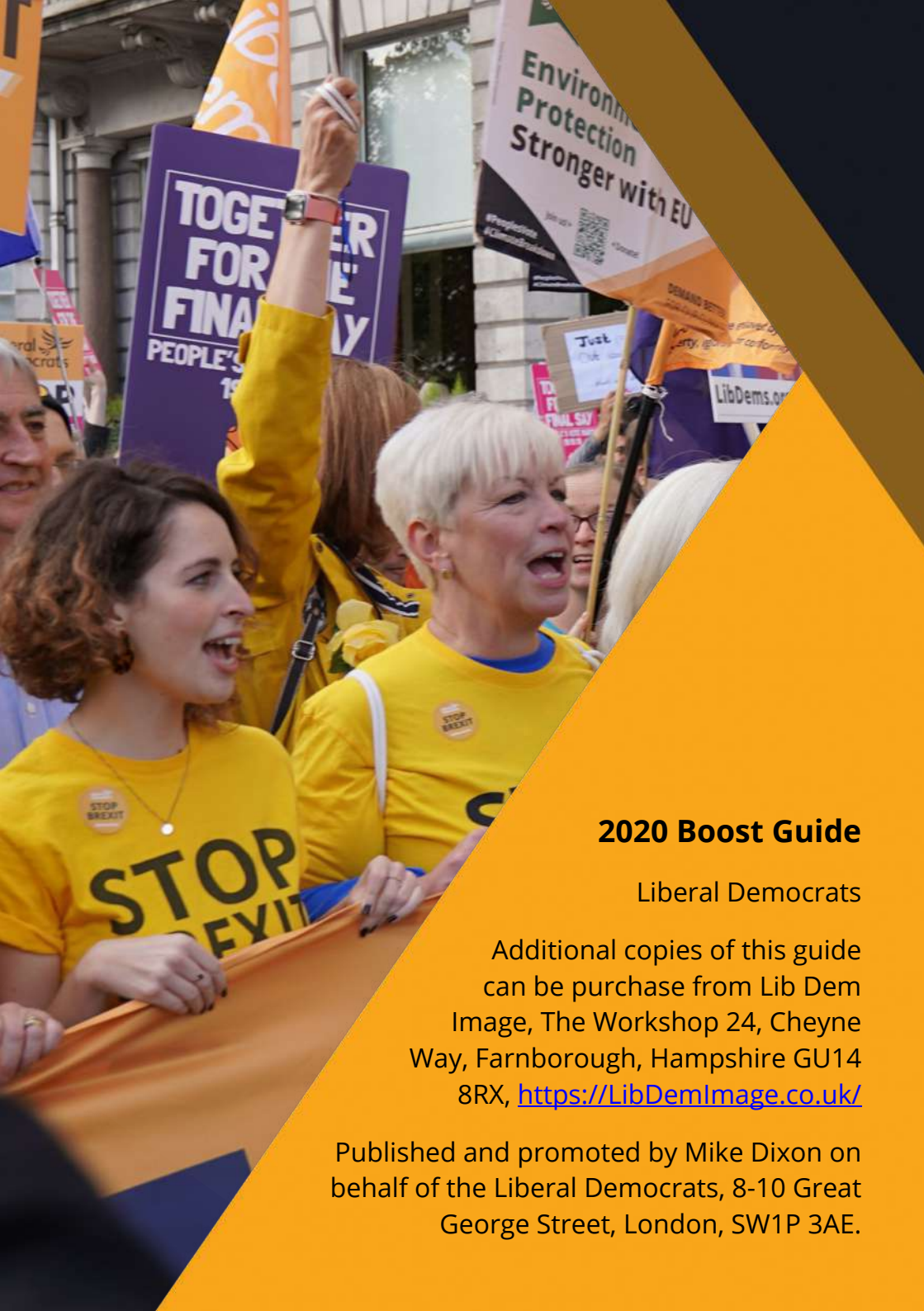
We have left the rest of this page blank for you to record any other good tips that you gather at conferences and from other campaigning colleagues.

That way you will have all your best ideas in one place.









## 2020 Boost Guide

Liberal Democrats

Additional copies of this guide can be purchased from Lib Dem Image, The Workshop 24, Cheyne Way, Farnborough, Hampshire GU14 8RX, <https://LibDemImage.co.uk/>

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