

DSC SPEED READS

**COMMUNICATIONS**

# Campaigning

Jay Kennedy



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Tel: 020 4526 5995

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# Introduction

## *Who will this book help?*

The concept of campaigning can be wide and diverse, spanning a plethora of issues from the hyper-local to the international. This short guide is focused on those working in the UK charity and civil society context rather than in political groups or activist movements. It will be useful to charity trustees, staff and volunteers who want to campaign for change and need to know how to get started.

The guide uses the term 'charity', although the principles outlined here equally apply to other civil society organisations and voluntary groups.

## *What will it give you?*

This book is intended as a starter kit and quick reference guide that can help you to campaign with confidence. It explains some of the key concepts, skills and techniques associated with campaigning, and offers top tips and strategies to help you design successful and impactful campaigns.

# Chapter 1

## What is campaigning?

*This chapter explains what campaigning is and why it matters.*

### Understanding campaigning

Campaigning, in a charity context, has many aspects and can mean different things in different situations. For the purposes of this book, we are talking about influencing the public, politicians or officials to take a particular course of action and, specifically, how your charity might do so on behalf of the people and causes it serves. For example, you might seek to:

- get politicians to change a law, or pass a new one;
- persuade politicians or political parties to adopt a policy or policies;
- draw public attention to a specific issue or raise awareness about a topic;
- represent people's needs to decision makers;
- influence government officials or institutions;
- take legal action to achieve justice for individuals and groups, or non-human things like animals or the environment.

All of these activities could be considered campaigning, although the techniques used, the mix of approaches and the target of the activity might vary. It's normal if the concept feels a bit elusive or confusing; don't worry and don't allow the initial uncertainty to get in the way of taking action. It can help to further grasp what campaigning is by considering a definition of it alongside some related concepts:

- **Campaigning** – working in an organised way towards a particular political or social goal.

The following can be considered as activities in their own right, but they're often elements of successful campaigns or tactics used to campaign successfully:

- **Public affairs** – a strategic approach to building and maintaining relationships with influential people, often in politics or government, to advance an organisation's interests.
- **Lobbying** – seeking to influence government policy or the decisions of politicians or government officials.
- **Advocacy** – where an organisation or individual supports another individual or group to understand and exercise their rights, or to help them articulate their views and needs to those in power.
- **Communications** – sharing information from one person or organisation to another to increase understanding or instigate action.
- **Community organising** – bringing people together to take action on issues that matter to them, often in a local area or to address social injustices.
- **Boycotts or consumer action** – efforts to influence companies or other institutions to change behaviour by targeting their profits or investments.
- **Strategic litigation** – bringing selected cases to court to challenge legislation or decisions of public bodies, often to raise awareness of the impact of injustice in the law for a wider group or cause.

Sometimes charities or charity trustees might be uncomfortable using the term 'campaigning' to describe their influencing activity on behalf of

beneficiaries, but if what they're doing fits the definition of campaigning included above, it's just a question of semantics. Charity campaigns often involve communicating to the public, advocating on behalf of a charity's beneficiaries, organising people to take action, lobbying politicians or officials to change policies and building relationships with stakeholders to achieve results.

## Charity campaigns make a difference

There can be a misperception that campaigning is separate to service delivery or set apart from the bread and butter of charitable work. Actually, many charity campaigns in the past were so effective at achieving their aims that we no longer think of them as campaigns and almost take those achievements for granted! Many of the public services and the rights we enjoy today are the result of campaigns that sometimes took decades or even centuries to win.

Much of the welfare state in Britain has charitable origins, often from collective action taken by people and communities to support themselves. This frequently involved charities pushing the government of the time to take on responsibilities more universally or to pass laws protecting people's rights – particularly those of marginalised or excluded groups.

### Case study – Section 28

The 1980s were the height of the AIDS crisis in the UK, and gay people, especially gay and bisexual men, suffered even further stigmatisation because of the disease. AIDS and HIV were not well understood, and at that time there were no effective treatments. In 1988, the government amended Section 28 of the Local Government Act 1986 to prevent local authorities from funding groups promoting equality and to keep schools from educating children about same-sex relationships. It spurred not just a charity campaign but also the creation of a campaigning charity – Stonewall. Activists who had opposed Section 28 set up the organisation and eventually succeeded in getting the government to scrap the law in 2003. As a charity, Stonewall has continued many campaigns for LGBTQ+ equality.





## Case study – COVID-19



Despite a long history of charity campaigning that has improved housing, issues like homelessness and a lack of social housing are still present in the UK. Charitable organisations such as Shelter and Crisis were founded in the 1970s to campaign for change and are still doing so today. These organisations constantly run many different campaigns, often involving petitions and pushing for commitments by political parties, to get the government to build more social housing and to improve conditions for homeless people. During the COVID-19 pandemic, Shelter led a successful campaign to get the UK government to put a temporary moratorium on evicting tenants, and it continued campaigning actions after the moratorium ended on behalf of renters who had built up arrears.

## Case study – national parks

The Campaign for the Protection of Rural England (CPRE) is a charity founded after the First World War, when urban sprawl threatened to spoil the green and pleasant land of the countryside. The CPRE was instrumental in the development of town planning and the implementation of green belts that restricted development around major cities. It was one member, along with other allies, of the Council for National Parks that was founded in 1936, which successfully advocated for the creation of important national parks in places like the Peak District, Lake District, Dartmoor and Eryri (Snowdonia).

## Go with what works

There might be as many different types of charity campaign as there are types of charity. Each organisation will have its own focus, understanding of its role, strengths and weaknesses, varying skills and appetite for risk. So don't worry if your own campaign doesn't follow the same model as comparable charities.

The neat thing about campaigning is that there are many ways to do it. Different approaches may be effective in different circumstances and times. The best campaigns regularly reassess tactics and take advantage of changing opportunities. The important thing is to try different things, persevere, review your progress and try something else if what you're doing isn't working.

# Chapter 2

## Getting started

*This chapter explains the key steps to get your campaign off the ground.*

Often campaigns emerge organically because people feel unhappy or passionate about an issue that needs to change in the world. There can often be a strong emotional element, which is vital to engaging supporters and driving the campaign forward, but at some point emotional fuel on its own isn't enough to make the campaign a success. There are some basic steps you should follow in the early stages that can help make sure your campaign isn't a flash in the pan.

### Consider your campaigning style

At the start, think about your organisation and how it works. What is it good at, and not so good at? What is its brand or personality? Is it known for being outspoken and challenging, or considered and diplomatic? What would be the most appropriate approach to achieve your campaign's goals (see page 17)? Is your charity already good at influencing in public and via the media? Or is it better at research, briefings and seeking meetings with politicians and officials? What level and types of risk are the trustees most comfortable with? Is the organisation used to working collaboratively, or is it most effective operating independently? Answers to these questions will guide you in adopting an approach that doesn't go against the grain of your organisation and its people.

## Agree the governance

‘Governance’ is a fancy way of saying: who is in charge and who is ultimately responsible? Who makes the decisions and what is the process for making them? In the case of charities, assigning the responsibility can potentially be a bit more straightforward – trustees are ultimately accountable for everything the charity does, including any campaigns. Trustees will need to provide approval for your campaign at the strategic level and require regular briefings on its developments. Depending on the charity, more detailed actions or adjustments to tactics in response to changing conditions can normally be authorised by senior managers, but they might also require trustee approval or at least notification, especially where additional spending or potentially controversial publicity is involved.

For other organisations, governance might be less clear cut. Often, there may be one or several leaders who run things, or some kind of collective membership that, for example, votes on actions or decisions. Even if your organisation or collective wants to limit hierarchy, it will still need some mechanism for making decisions and resolving differences. Otherwise, the campaign may not be able to take advantage of opportunities and could even split or collapse.

## Coalitions

A key consideration at the outset is to be clear whether there is one main organisation leading the effort or it is part of a broader coalition. A related question is the level of involvement and leadership (and therefore responsibility and accountability) between the organisations involved. For example, is one organisation leading the campaign’s strategy and activity, and asking other organisations to ‘sign up’ to something or take certain actions in support? Or is there a small group of organisations that run things on a collective basis, with the rest playing more supporting roles? Are some organisations providing financial or human resources that might give them more of a vested interest (and undue influence) in strategy or decision-making? What’s the nature of each organisation’s contribution and responsibility compared to others?

It's important to be clear about what the different roles and expectations are and what supporting the campaign means in practical terms, so that participating organisations can manage their own internal governance effectively. Having a dedicated campaign team, composed of people with the skills and knowledge needed to make the campaign work, can help to organise and lead activity, and provide a focal point for people at different levels to engage with.

### *Governance checklist*

- ❑ Discuss with your trustees about what the organisation's campaign style might be, how they will be involved or updated, and the types and amount of risk they are willing to take for campaign success.
- ❑ Think about the roles and responsibilities of different individuals and organisations involved in the campaign. Who is leading and who is supporting? What are the systems for reaching agreement (and for resolving disagreements)?
- ❑ Set up your campaign team, including the key people who will be making decisions and doing the campaign activities.

## **Explore your theory of change**

Your next step should be establishing your theory of change. It describes what your campaign aims to change, how it will make the change happen and by when. Do an exercise with your campaign team to envisage the future success of the campaign and what it will achieve. Ask questions to define what success would look like and map out the available resources to realise the goal. Think about the stakeholders the campaign will need to involve or mobilise, what tactics will best influence them, and how those involved in the campaign will work together. Plot the point of success at a time in the future and work backwards to fill in all the pieces of the puzzle between future success and current reality.

### *Theory of change checklist*

- ❑ Agree your campaign's goal. It needs to be specific and achievable.
- ❑ Establish how long it will take to reach the goal – including timeframe, and the outputs and outcomes needed.

- ❑ Consider available resources. Do they affect the timeframe?
- ❑ Consider how to measure progress and success. How and when will the campaign re-evaluate its objectives? How will campaigners know the goal has been achieved?

## Do a skills and knowledge audit

This step involves, first, identifying the skills and knowledge your charity or coalition already has and how developed they are. Second, identifying what skills the campaign needs. And, last, comparing the two to understand any gaps where your campaign team might need to learn new skills or add them from elsewhere.

Ask your campaign team to list their skills, including ones that don't relate to their job title or the volunteering work they do. Staff and volunteers can often have useful and unexpected skills that could benefit the campaign. For example, one person might have specialist knowledge in a particular campaign tactic from a previous role. Another person might have a lived experience which is critical to conveying the campaign's messages. Chapter 3 looks at what skills are needed for a successful campaign in more detail.

### *Skills and knowledge audit checklist*

- ❑ List all the skills of the team – including less obvious ones.
- ❑ List what skills the campaign needs.
- ❑ Compare the two: what team skills match up with the campaign's needs, and what skills are missing?
- ❑ Decide if the team will learn the missing skills or you will source them externally.

## Make a campaign plan

A basic campaign plan might seem like a hassle, but it can be a useful tool for getting people into agreement about their roles and responsibilities, and for evaluating progress. In this step, think first about the theory of change exercise (see page 11) and the people and resources you have or could develop. Then consider the timeframe and any milestones or review points. Map the

timeframe in columns (for example, broken down into weeks, months or years) and the campaign actions or responsibilities assigned to individuals or supporters in rows. A simple Gantt chart is sufficient for this exercise.

### *Plans are nothing, planning is everything*

Dwight D. Eisenhower, the top Allied General and later US President, is often credited with the quote: 'Plans are nothing, planning is everything.' But what has this got to do with campaigning?

Basically, a plan is just an attempt to model the future, but the future is unknowable and unpredictable. The nature of campaigning is about creating change. The act of planning is more important than the actual plan, because the plan will most likely have to change once conditions change. Once change starts to happen, unanticipated decisions and unforeseen opportunities will arise. In the words of the former British Prime Minister Harold Macmillan, 'events, dear boy, events' will crop up and impact the most brilliant plans and strategies.

Eisenhower's point is that plans should embed communication pathways between people and create a shared understanding of their roles and responsibilities. A plan is a tool to help you achieve your objective, not the objective in itself.

### *Campaign plan checklist*

- ❑ Draft a campaign plan that reflects the objectives, resources and people available, and any review points.
- ❑ Plan things out against a realistic timeframe.
- ❑ Ensure the plan shows what actions will be completed by whom and by when, and the point of achieving success.

### **Agree key messages**

It is crucial to have clear messages that convey what your campaign is about, why it is important, who it will benefit and what you want people to do to make it happen. If the messages from your campaign team are simple and concise, it will be easier to communicate them and for your target audience to understand them.

Most people don't have much time to process lots of detailed information. Figure out a quick campaign 'pitch' by distilling the message into no more than three to five succinct points. Try to answer the key questions the campaign's target audiences might have – what, who, why, how and so on. Importantly, don't use jargon or assume any prior knowledge, as this will likely confuse your audiences. Always include a 'call to action' – in other words, what people should do to show their support – such as write a letter, follow the campaign on social media, sign a petition or go on a march. It's a good idea to test your messages with some unaffiliated people to ensure they make sense.

Campaigns, by their nature, can invite opposition and even attacks by politicians or the media on the organisations carrying them out. Don't be intimidated. Part of the campaign's message to the wider public should be about why your charity is campaigning, why the campaign is important and legitimate, and how it will benefit the people your organisation is there to serve. Don't be cowed by those who say charities should be seen and not heard – history shows otherwise.

### *Key messages checklist*

- ❑ Develop a basic communications plan with its main action points aligned to key activities in the main campaign plan.
- ❑ Check that messages are clear, concise and free of jargon – do people outside your campaign team and organisation understand them? Practise saying them out loud so that the campaign language feels natural and you are comfortable discussing the campaign publicly.
- ❑ Regularly check that everyone is sticking to the agreed messages.

## **Develop materials**

At this step of your preparation, think about the materials that you will need during the campaign. It takes up time and resources to prepare them and may be hard to do once the action really starts. Materials might include leaflets, a website, template letters, social media content, testimonials or case studies. These do not have to be done all at once, as they may date; however, think about what materials you will need when designing the campaign plan and key messages.

## Materials checklist

- ❑ Set up a dedicated website and social media accounts if needed.
- ❑ Develop campaign branding, including logos and style templates.
- ❑ Draft template letters and leaflet copy to amend later.
- ❑ Start work on case studies, which can take time to produce.

## Understand and celebrate success

Lastly, your campaign's theory of change and campaign plan should provide a framework to understand what represents success for your campaign. However, the nature of campaigning is often not so predictable. Different opportunities and challenges are likely to present themselves along the way, which may require changes to tactics or strategy, which then might mean re-evaluating success criteria.

It is important to recognise and celebrate what may seem like partial wins. Doing so will keep your campaign team and supporters motivated. If there is clear evidence that your campaign has made a difference, even if it hasn't yet achieved all its goals, it's vital to communicate this to the people connected to the campaign because it shows the campaign is working.

## Success checklist

- ❑ Craft an article or email to supporters informing them of the latest win, thanking them for their efforts, explaining why they made a difference and including a call to action for their next step.
- ❑ Write a thank-you letter to a politician if they've acted on your demands or supported your campaign. Make sure to publicly thank them for their efforts so far and ask them to support the next stage.
- ❑ Issue a press release to highlight how your campaign has succeeded and offer an interview.
- ❑ Host a victory party with supporters. Invite the media and any politicians that helped bring about the campaign's success.



# Chapter 3

## Skills and tactics

*This chapter explores the tactics and skills you need to carry out a campaign successfully.*

### Transferable skills

Campaigning isn't some exclusive thing open only to those with deep knowledge of the political system. Plenty of effective campaigns are run by people without any experience who rely mainly on their own passion and persistence to right an injustice or improve the world for the better. Campaigners often grow or learn the skills they need on the way, and their creativity can be a useful foil to the political system, which can seem overly procedural, bureaucratic and even antiquated by contrast.

Charity trustees, volunteers, staff and beneficiaries will often have the right qualities, and there are some important transferable skills that people from all walks of life can bring to campaigning. A mix of skills, and aligning the right skills to the right tasks, is helpful for success in campaigning. Some of these are:

- **Communication skills.** Written communication skills are important to draft letters, documents, leaflets or website and social media content, for example. Oral communication skills are arguably even more important for campaigners, both to get the message across to decision makers or the media and, significantly, to inspire the public.

■ **Networking skills.** Great campaigners are a bit like great fundraisers. They're skilled at making contacts, creating relationships, and persuading people to get involved with their energy, time and support. Charity leaders are often adept at this, but don't overlook others.

### Where next?

For more on how to network, read *Networking* by Debra Allcock Tyler:

[www.dsc.org.uk/net](http://www.dsc.org.uk/net)

- **Listening and facilitation skills.** Charities exist to serve a cause, and a campaign will be more powerful to politicians and the public if it is grounded in the lived experience of people the charity serves. Being able to articulate their needs – or, better still, to facilitate their own communication on behalf of the campaign – can be a real asset.
- **Analytical skills.** Assessing lots of information, responding to rapidly changing developments and synthesising complex information into key themes that can feed into decision-making is crucial for effective campaigning. Good campaigners pay attention to news and public affairs constantly to identify new opportunities and chances to make an impact.
- **Creativity.** The best campaigns incorporate an element of creativity and even fun. Making things interesting or humorous is likely to engage people who otherwise wouldn't pay any attention. It also helps drive media coverage, which can raise awareness, put pressure on decision makers or help drive donations to support the campaign.
- **Planning and organisational skills.** Campaigners may have lots of ideas and creativity but lack planning and structure. Some planning will be needed to effectively assign available resources to competing priorities, and organising skills can help supporters understand their roles and work in the same direction.

## Insider versus outsider approaches

The long-serving director of the FBI, J. Edgar Hoover, had already outlasted multiple presidents when US President Lyndon Baines Johnson took office. Johnson had to decide whether to keep Hoover on. In typically vivid Texan style

he reportedly remarked: ‘It’s probably better to have him inside the tent pissing out, rather than outside the tent pissing in.’

The metaphor of inside and outside the tent is an apt one for campaigners to consider. There can be big debates about which is best: should your campaign be outside the corridors of power, true to the spirit of authentic grassroots activism, mobilising the people to force politicians to change? Or should you seek to gain influence behind the scenes, gaining allies and influence via quiet diplomacy and less public relationships?

The reality in practice is that often both approaches are needed, but they can be difficult to execute at the same time. Outsider campaigns that highlight their distance from the powerful and authenticity to the grassroots may find themselves in uncomfortable territory once they achieve success and are invited ‘within the tent’ to make the deal. In contrast, insider campaigns may suffer from a lack of legitimacy with the public or supporters and can be vulnerable to manipulation from the very politicians or officials they are trying to influence.

If politicians and the public just aren’t listening to your message, or your beneficiary group is highly marginalised and oppressed, then an outsider approach might be in order – such as organising a protest to support refugees or occupying a building to protest a lack of action on climate change. In this case, charity trustees will need to think carefully about the risks of volunteers or staff breaking any laws and the potential for the charity to end up in trouble with the police or regulators.

On the other end of the spectrum, your campaign’s goal might be to convince the health service to provide an experimental treatment that would save the lives of people with a certain illness that your charity exists to support. In this case, an insider approach might be more effective: for example, raising money from high-net-worth individuals to carry out scientific research and then lobbying politicians and the Department of Health to take the treatment on. Even though it might not seem so obvious, this still can be considered campaigning.

Successful campaigns may change their insider/outsider posture as conditions demand, or get different allied organisations within a coalition or different campaign supporters to play different roles.

## Going fast versus going far

There's an African proverb that's worth thinking about with campaigning: 'If you want to go fast, go alone; if you want to go far, go together.' While there may be exceptions to this adage, it is relevant not just to planning your campaign and finding the most effective strategy and tactics, but also to getting the right campaign governance in place.

Single organisations, small groups or individuals can be very effective at campaigning if they have a clear message and specific objective that rapidly galvanises public attention. For example, where an individual is the victim of a certain tragedy or injustice and the person's family campaigns for accountability from institutions or demands change to legislation to prevent an injustice from happening again.

Such campaigns tend to be flexible and responsive to changing developments. They can appear authentic, especially when putting an individual's lived experience at the forefront. They aim to 'go fast' without the encumbrance of managing conflicts between large numbers of organisations with potentially different styles, interests and varying levels of investment in the outcome.

However, some challenges are so weighty and entrenched they require huge coalitions or federations of organisations to make any progress. For example, campaigns to reduce greenhouse gas emissions or achieve equality for certain groups may take years or even decades to succeed, with incremental victories along the way. While a single organisation or individual might be influential, they may not always have the capacity or resources to gain traction and keep the momentum going for a long time by themselves. In these cases, a broad coalition that can 'go far together' might be the best or only option.

Doing things in coalition can be more difficult to organise and mean that the campaign is always travelling at the speed of the slowest. However, doing things more independently usually means less capacity and back-up. It's worth thinking about these dynamics at the outset and at key review points.

## Campaigning tactics

There are many possible tactics to use in campaigning, and it's best to first consider your campaign style (see page 9), your charity's brand, the skills of the campaign team, the trustees' appetite for risk and what's likely to be most effective. Some common campaigning tactics include:

- **Letter writing.** Contacting politicians in this way can be a good option for many charity campaigns, especially if you can show a connection to the MP's constituency. Research which MPs are most likely to care about your issue. Then see if you have members, supporters, volunteers or trustees who live in their constituency. Find the MP's address from parliament's website. Get your letter writers to put into their own words succinctly why the campaign is important and what the MP can do to help (a clear ask). If they don't respond immediately, keep trying.
- **Press releases.** Writing good press releases is an art form you should master, because the content can have many other uses – for example, as the basis for web articles or social media threads. The best press releases announce something newsworthy, have an eye-catching headline, summarise the key information in the first sentence, include a quoted statement from the campaign lead and finish with clear contact details for more information.
- **Social media.** Various social media platforms are now commonly used by all kinds of campaigners. They can be very effective in getting the word out to supporters, co-ordinating actions and attracting press interest. Think about what

### Top tip



Do the hard graft for the media. Busy journalists want oven-ready copy. If your press release has a snappy heading and short, clear and impactful copy that requires little intervention, it is far more likely journalists will take it up and use it.

platforms you will use, who will monitor them and how to make the content engaging – for example, by incorporating video content from your campaign’s supporters or the people who would benefit from its success.

- **Case studies or testimonials.** You can amplify your message by sharing the experiences of those who are involved in the campaign. It works best when relevant people speak out directly or at least are directly included in drafting the message. This tactic may take some time, as you need to develop the testimonials, get people’s consent and make sure their interests are protected.
- **Petitions.** This campaign tool can be useful but has its limitations. A petition with loads of signatures might spark media interest or even spur politicians to hold a debate, but one with very few signatures simply shows how little people care about the campaign! If your campaign has mass support behind it, mobilise those numbers – otherwise, consider different tactics.
- **Public speaking.** This tactic is often a key part of campaigning. Having someone who can communicate your message passionately to an audience, either in person or virtually, is a real asset. This might be in speeches at a demonstration or giving evidence to a committee in parliament. If your campaign team doesn’t have those skills, think about how to develop them. Develop a habit of practising mock media interviews or speeches.
- **Research.** Solid evidence to back up your campaign’s objectives and arguments is important to have or develop. For example, statistics about what beneficiaries need or what your campaign’s supporters think can help make your case and provide useful content for media. It’s also a good idea to research whether similar campaigns exist already, and what organisations might be potential partners or allies, or opponents.
- **Protests and demonstrations.** Outsider-type approaches might involve organising public events designed to get attention. Charities doing so need to understand and comply with relevant laws and get permissions from authorities, or their staff, volunteers and trustees could be put at risk. Legislation such as the Police, Crime, Sentencing and Courts Act 2022 and The Public Order Act 1986 (Serious Disruption to the Life of the Community) Regulations 2023 has increased restrictions to the right to protest and gives

more powers to the police. Charities engaging in these activities should carefully consider the risks and how to support campaigners if things go wrong.

Think about the campaign's style, governance and objectives as well as the team's skills when choosing the most suitable tactics. Once you have decided which tactics to use, prepare draft materials that incorporate key campaign messages, such as template letters, press releases, case studies and social media content. Make sure the research and evidence you have gathered supports the campaign and is weaved it into your communications where relevant.

## The art of communications

It's all well and good having a carefully crafted campaign plan and lots of willing supporters, but if your campaign team can't succinctly articulate some key messages, you'll likely struggle for success. That's where the art of communications comes in.

Good communications are basically about presenting complicated information in a concise, accessible and memorable way (refer back to 'Agree key messages' on page 13). If this feels hard to do, that's because it is! Government ministers receive hours of media training that teaches them to stick to a few simple points in media interviews while the journalists try to knock them off script.

The term 'strategic communications' refers to deciding your key campaign messages and then repeating them consistently, and in volume, over time. The theory is that if you do this enough, with enough spokespeople, your message will eventually gain traction or understanding in the public debate. Often this is used in a political context, but it applies to charity campaigns too.

### Where next?

For more on communicating with the media, see *Media Relations* by Moi Ali:

[www.dsc.org.uk/publication/speed-read-media-relations](http://www.dsc.org.uk/publication/speed-read-media-relations)



## Campaigning ethics

There's no agreed ethical framework for campaigning; however, below are some tips, behaviours and practices that can help campaigns to succeed while maintaining an ethical approach.

- **Play the ball not the person.** It's easy to get frustrated with the behaviour of those in power. Nevertheless, it's essential to avoid personal attacks and keep any criticism constructive and centred on the policy itself. This will help win your case in the court of public opinion.
- **The price of every criticism is a solution.** It's usually easy to point out all the things that are wrong with a situation, decision or policy that your campaign is against. It's much harder to suggest what the solution should be. Always come prepared with the alternative – what needs to change, why and how? This opens the door to dialogue and change.
- **Give fair warning.** 'Playing fair' in campaigning means being transparent about your campaign's arguments and actions. Especially if the campaign is going to come out strongly in opposition to something, give the other side notice so they can respond in the best way. This is especially important for officials who might need to prepare responses on behalf of politicians; you will want to keep those gatekeepers happy.
- **Act in good faith and keep it legal.** Don't lie or fabricate information, or make libelous statements about your campaign's opponents. Don't pretend you will honour a commitment without any intention of doing so. Be transparent and make sure to comply with relevant laws.
- **Back up arguments with solid evidence.** There's an old joke that politicians use evidence like a drunk uses a lamp post – more for support than illumination. Charity campaigns can fall victim to this too; in the reality of political debate, ideology often trumps facts. Don't fudge the evidence – this will make your campaign look untrustworthy to its supporters.
- **Be grounded in your beneficiaries' needs above all.** Charities can't campaign for any old reason; it needs to be in support of their charitable purpose. Charity campaigns should ideally involve and give a voice to the people that the charity serves. Always put them first.



# Chapter 4

## The law

*This chapter explains the key legal considerations when it comes to charity campaigning.*

### Campaign with confidence

Sometimes charities or trustees are put off from campaigning because it's perceived as legally risky. However, it's important to remember that charities exist to serve their charitable mission and their beneficiaries, and it's entirely legitimate to do so by campaigning.

Managing risk is indeed a key responsibility for trustees, but this includes the risk of inaction, not just the risk of adverse publicity or annoying powerful people. If a charity's trustees do nothing while circumstances around them change in a way that negatively affects their beneficiaries, they aren't managing risk effectively.

The law and regulation about campaigning can be complex, but key rules of thumb and main things to know will help charities campaign with confidence.

### Charity law and campaigning

Charity law and the guidance around charities and political activity are well established and pretty clear. Charities can engage in political activity as long as it's in support of their charitable objectives. The activity must be related to the charity's work and its mission, not something different.

Political activity can't be the main reason the charity exists (it isn't a charitable object in and of itself), and it can't be the charity's only and ongoing activity. Charities must not support or endorse particular parties or candidates, or encourage voters to vote for or against them.

It can be helpful to view political activity in terms of small 'p' versus large 'P'. Think of small 'p' as engaging broadly in the political process or with the political system in service of the charity's beneficiaries and charitable mission. Large 'P' means supporting individual politicians or candidates, or urging voters to vote in certain ways. Small 'p' is perfectly fine for charities if they follow the Charity Commission's guidance; large 'P' is prohibited.

Charities can write letters to MPs or ministers, seek to influence political parties to adopt policies that would support their beneficiaries (or to reverse or alter policies that harm them), speak in public or to the press about these things, and engage supporters and the public in campaigns to make change happen. This is the case during election periods just as at any other time, as long as it's in pursuit of the charity's charitable objectives.

It's also worth remembering that the press, some politicians and even parts of the public may not see charities' legitimate and legal small 'p' activities this way – because they often have little understanding of charity law. So, just because a charity is within its rights to campaign in a certain way, that doesn't mean it won't encounter opposition or even hostility from some quarters. Anticipate potential opposition and negative reactions to your campaign and make sure your planning reflects how you will counter those.

### Where next?



The Charity

Commission's *Campaigning and political activity guidance for charities* (commonly known as CC9) should be the first port of call for charities and trustees that are planning or running campaigns. It summarises the main things charities can and can't do, and provides key questions to ask.

[www.gov.uk/government/publications/speaking-out-guidance-on-campaigning-and-political-activity-by-charities-cc9](http://www.gov.uk/government/publications/speaking-out-guidance-on-campaigning-and-political-activity-by-charities-cc9)

The crucial thing to consider in practice, especially at election time, is that your charity's small 'p' political activities aren't favouring particular parties or candidates and, above all, not straying into that large 'P' territory of influencing voters to vote for *specific* parties or candidates. For example, by asking only one party to adopt your charity's policy recommendation, or producing leaflets that urge your supporters to vote for or against a certain party or candidate.

## Navigating elections regulations

The UK Parliament has passed laws to regulate the activities of political parties, candidates, donors and what are known as 'non-party campaigners' – such as unions, pressure groups and think tanks, but also charities and other civil society groups. Much of this is about voting and how elections are held, but the regulations also attempt to exert some control over donations (money and in-kind support), and the activity those donations support in the political system.

The Electoral Commission has the difficult task of not just translating this legislation into intelligible guidance but attempting to regulate political parties and politicians in the heat of election campaigns when stakes are highest.

Over recent years, there have been concerns that charities and other not-for-profit organisations could be unwittingly swept up into the regulatory regime, causing them to curtail their activities. In 2014, the so-called Lobbying Act caused consternation by bringing in new rules on non-party campaigners. This Act amended pre-existing legislation called the PPERA – the Political Parties, Elections and Referendum Act of 2000.

### *Spending at election time*

The PPERA includes four key tests to establish if an activity falls within its regulations, sets spending thresholds and describes types of regulated activity, in particular around 'controlled expenditure' (i.e. 'any spending incurred in respect of regulated campaign activity'). It gives examples of this expenditure,

such as on transport, rallies or public events related to election campaigns, campaign materials (i.e. leaflets), and canvassing or market research.

It's important to remember that the PPERA regulations and related Electoral Commission guidance are primarily about reporting relevant spending to the Electoral Commission rather than prohibiting activity. All four tests must be satisfied for the activity to be regulated. If any one of them isn't met, the activity is not relevant and the reporting requirements to the Electoral Commission don't apply. The tests are:

**1. The Period Test.** The activity must take place within the 'regulated period' of the election (in the case of a general election, this is 365 days before).

**2. The Purpose Test.** The activity must be intended to 'promote or procure the electoral success of: one or more political parties; or candidates who support or do not support particular policies; or another particular category of candidates'. If you're following the key principles of charity law outlined above, your activity is unlikely to meet this test.

**3. The Public Test.** The activity must be for the public, meaning in public or for public consumption, rather than solely for an organisation's members.

**4. The Spending Test.** There are financial thresholds relating to activities that meet the three tests above. If an organisation crosses the threshold, it needs to notify and

register with the Electoral Commission. There are rules about how to report the spending on 'regulated activity' once the organisation is registered. Organisations can spend up to £10,000 without having to register with the Electoral Commission.

### Top tip

If your charity is running campaigns and you know an election is coming up, don't just down tools to avoid risk. Instead, read the elections guidance and schedule a discussion with your trustees about whether your planned activity would even fall within the scope of relevant regulations.



## Joint campaigning

The Electoral Commission has published a code of practice for non-party campaigners which should help clarify some particularly confusing areas. For example, ‘joint campaigning’ – when organisations co-ordinate campaign activities or sign up to a campaign led by another organisation. This is especially important for campaigning charities, which will often work in coalitions.

Helpfully, the code says: ‘If there is no intention to incur expenditure there is no joint campaigning.’ For spending on joint campaigns to count as controlled expenditure, there ‘must be an agreed understanding [between the campaigners] that controlled expenditure will be incurred to achieve the common purpose’.

The new code makes it clear that endorsing another campaign, adding joint signatures to a letter or speaking at an event without any financial commitment do not count when it comes to establishing if something is joint campaigning, and therefore such activities wouldn’t count towards the spending and other tests described above. These campaigning activities are common in the charity sector, and these clarifications should help trustees to be more confident that they’re acting appropriately when, for example, their charity signs an open letter or supports another charity’s campaign.

### Where next?



The code of practice for non-party campaigners came into force on 1 December 2023. It is a useful summary of the elections regulations and includes examples to illustrate circumstances when registering with the Electoral Commission may or may not be required.

[www.electoralcommission.org.uk/non-party-campaigner-code-practice](http://www.electoralcommission.org.uk/non-party-campaigner-code-practice)

# Chapter 5

## Key institutions and resources

*This chapter explains some of the key institutions and resources for campaigners to know about.*

### Regulators

**Charity regulators.** Charity campaigners should note that in advance of elections or referendums each of the three UK charity regulators may separately publish or update guidance on political activity, tailoring it to its own jurisdiction, the different elections that take place within it, the legislation that governs its work and the specific accountability arrangements it has to government institutions.

**The Electoral Commission.** This is the independent body which oversees elections and regulates political finance in the UK. Its job is to promote public confidence in the democratic process and ensure its integrity. The Electoral Commission operates UK wide, maintains registers of political parties and non-party campaigners, provides guidance such as the code of practice for non-party campaigners and takes action in cases where the law may have been broken.

### The Government and Parliament

The UK has four different parliaments, hundreds of local governments and scores

of arms-length agencies with varying degrees of independence from ministerial control, often known as Non-Departmental Public Bodies (NDPBs). Depending on the nature of a charity's campaign and its strategy, it may need to engage with the politicians and officials within these institutions.

- **Government departments** cover the main areas of national policy, for example health, education, defence, foreign policy and home affairs. Depending on a charity's work, certain departments will be more important to understand and influence.
- **The House of Commons** is formed of the elected members of Parliament (MPs) and plays an important role in scrutinising the Government, for example via debates and parliamentary written and oral questions. Getting an MP to ask (or 'table') a question for a government minister to answer can reveal previously unknown information or bring your campaign more visibility. Getting your local MP on side can be a good way for your charity campaign to gain traction if it is very local or has an impact across local areas. Often MPs will ignore circular letters or leaflets from national campaigns unless there is a constituency connection.
- **The House of Lords** is the non-elected second chamber of the UK Parliament. You may find that members of the House of Lords have charity expertise from previously running charities or have been involved in legislation or regulations that affect charities, or the charity's beneficiaries. They may be more accessible than MPs or ministers, because they are often less beholden to the party 'whip', which is where a political party controls how its members vote.
- **All-Party Parliamentary Groups (APPGs)** are informal cross-party groups that have no official status within Parliament and are run by and for both MPs and peers. There are hundreds of APPGs, including many which are relevant to charities or charitable missions. Although APPGs have no formal power, they can be a good way to raise issues and identify MPs or peers that might support your cause.
- **Parliamentary committees** operate in both the House of Commons and the House of Lords (sometimes as joint committees) to undertake enquiries, take evidence from the public, scrutinise the work of ministers and officials, review government policy or draft legislation. Depending on your campaign,

there can be opportunities to influence politicians via these committees, for example by providing written or oral evidence during enquiries.

- **Devolved administrations** in Scotland, Wales and Northern Ireland have jurisdiction over typically more ‘domestic’ policy areas such as health, education and transport. Campaigners in these devolved areas should familiarise themselves with the policies and the different political make-up of the relevant administrations. Devolved administrations will have authority over policy areas relevant to many charity campaigns, and they also have responsibility for civil society policy in their respective areas. For example, in Wales there is a ‘Third Sector Scheme’ which sets out in law how the Welsh Government and the voluntary sector will work and communicate with one another.
- **Local government** includes county, district, borough or city councils, and unitary authorities. Local government provides some or all local services. Many charity campaigners will aim to influence the decisions and policies of local councils either by engaging with councillors or council officials. A good place to start is the local authority’s website – find out what type of authority yours is, who is in charge of the council and your policy area, and any upcoming meetings. The Local Government Association (LGA) maintains an A-Z list for England and Wales (see <http://tinyurl.com/5duwpt55>).
- **Mayoral administrations** have been put in place to govern larger metropolitan areas such as Greater Manchester, London and Birmingham. These ‘combined authorities’ aim to establish greater local control over funding and policy (for example, transport) in a substantially urban region. These administrations have different powers and accountabilities depending on individual deals struck with central government.
- **Non-Departmental Public Bodies (NDPBs)** vary hugely in their focus, governance and degree of independence from the UK and devolved governments. Many of them will be relevant to charity campaigners as they may play a role in implementing policies that affect civil society and particular beneficiary groups. You can find a full list at [www.gov.uk/government/organisations](http://www.gov.uk/government/organisations).



## Helpful links and resources

### *Petitions and campaign tools*

The websites [www.change.org](http://www.change.org) and [www.38degrees.org.uk](http://www.38degrees.org.uk) provide online tools to develop petitions for your campaign. The UK parliament also has a function to start and sign petitions (<https://petition.parliament.uk>).

The website [www.theyworkforyou.org](http://www.theyworkforyou.org) is a free online tool that helps you track what individual MPs and lords are saying in Parliament and how they vote. You can tailor the search to your criteria and receive email alerts.

### *Parliamentary business*

You can use the UK Parliament's website ([www.parliament.uk](http://www.parliament.uk)) to find out more about MPs (and how to write to them), the full list of committees (and their business) and what bills are at what stages of being passed.

### *Freedom of information requests*

The Freedom of Information Act 2000 provides public access to information held by public authorities. Making a freedom of information request can be a time-consuming but effective way to get information out of public bodies that are not providing information transparently. Requests must be in writing. See [www.gov.uk/make-a-freedom-of-information-request](http://www.gov.uk/make-a-freedom-of-information-request).

### *The Public Law Project*

Public bodies have to follow the law, act rationally and in accordance with people's rights. If they don't, their actions can be challenged. This can take several routes, including making a complaint to an ombudsman, appealing at a tribunal or even judicial review, where a court reviews the public body's actions and may deem them unlawful. See [www.publiclawproject.org.uk](http://www.publiclawproject.org.uk) for more information.

# Campaigning

Campaigning can take many forms and shapes. It can target local and specific issues, or it can span international concerns and far-reaching policies. This short guide acts as a starter kit and quick reference guide for charity trustees, staff and volunteers who want to campaign and need to know how to get started. It explains some of the key concepts, skills and techniques associated with campaigning and offers top tips and strategies to help you design successful and impactful campaigns.

Jay Kennedy is Director of Policy and Research at the Directory of Social Change (DSC). For over a decade, Jay has led DSC's campaigns and efforts to influence government policy to benefit the charity sector, often working with many other organisations and individuals to get results. He also leads the team that researches funding information for DSC's well-known funding guides and website.

'However experienced you are in charity campaigning, and especially if you're about to embark on it for the first time, this easy-read guide can give you the confidence to understand the different options, methods and considerations in putting your campaign ideas into action. Essential reading for everyone who wants to get involved in changing the world.'

**Kathy Evans, charity campaigner and former CEO of Children England**

## DSC SPEED READS

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Information fast if you are short on time

[www.dsc.org.uk/srs](http://www.dsc.org.uk/srs)

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