# Effective campaigning for Union Reps (online and in person)

## Tutors’ notes

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| Current version | 1 |
| Date of last update | June 2023 |
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| Version history | * 1.0 – First draft of new training materials |

## Introduction

This is the campaign training for reps on the Level 2 of the National Education Programme. It is aimed at giving a comprehensive framework which reps can use now and in the future to effectively plan and run campaigns.

These comprehensive tutors notes form a guide when delivering this course. As with all of the training, there is a good mix of tutor led sessions and practical sessions for reps to build their confidence and understand more about what is involved in planning and delivering a campaign. During the various sessions, reps are invited to add notes and comments into the workbook so as to form a comprehensive campaign plan. This will enable reps to return into the workplace, expand their current knowledge and understanding and help them to get active straight away.

At all points attendees should be adding notes to their personal action plans.

We would then suggest Organisers/Negotiators follow up, encourage and support the next steps in actually delivering the campaign for real. Tutor feedback should be submitted as per other NEP courses

The materials are the same for online or in-person delivery.

**Breaks and Sessions**

On the NEP the course will run on one day over two sessions and we advise that this is replicated in branches/bespoke sessions. The morning session (3.5hrs) incorporates 15 minutes worth of break which could be 3x 5 mins, 2 breaks of 10 and 5 mins etc but is left to the tutor. The break between sessions is 90 minutes to allow for groups to develop their presentations as well as have a lunch break. The afternoon session is 1 ½ hrs.

## How these notes work

There are 4 core resources associated with the course:

1. The PowerPoint presentation, which includes visual aids, but also maintains the structure/order of the course
2. The participants workbook, which constitutes a information resource and a record of planning
3. The tutor’s notes which explain the activities, suggest discussion-prompts, give (loose) timings, and ‘index’ the other resources, tying the whole thing together.
4. As tutors who’ve committed to delivering this course, we would suggest a small amount of preparation time ahead of the course to ensure you’re familiar with the session, activities and tutor instruction.

## Tutor Notes/Course Structure

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| **Session** | **Slide no/WB page** | **Notes** | Resources |
| **Welcome**  (Before 10am) | Slide 1 | * Invite people, as they arrive, to skim through introductory section of workbook (History of Prospect/ Trade Union Terminology)   In person   * Write on name cards. * Coffee and tea, water if provided. * Introduce to Zoom/Teams as required. Explain use of captions if needed. Explain that in some of the course they will be put into breakout rooms (if applicable) | **Tutor to ensure you have; Screen, projector, flipchart and pens**  **Workbook, tutor notes, name cards**  **T&S policy, expense forms, Evaluation forms, E&D forms.**  **Use Polls for online sessions** |
| Introductions and objectives | Slide 2 | * Introduce tutor(s) here. * Pronoun to be mentioned and refer to name cards if necessary * Go over housekeeping: toilet locations, fire alarms (NPH Friday morning), timetable for the day & breaks (roughly 11.30, 13.00, 15.00) and mention punctuality * Interactive course and reps are encouraged to discuss, raise items and participate in the sessions. * Either use the introduction method in the workbook or go for brief introductions if a large group. | Name cards  Tea, coffee etc  Tutor to find out when the fire alarm is in other venues other than NPH. |
|  | Slide 3 | * Go through Learning outcomes. * Explain the images briefly, these both illustrate what campaigning is aiming to do within a planned structure. * Highlight that they will need to think digitally as well a physically. |  |
|  | Slide 4 | * Go through these ideas and emphasise:  1. Even resisting change is asking someone (the target) to do things differently. With information campaigns you might be asking people to think differently 2. Campaigns don’t just happen they need planning, monitoring and frequent evaluation. 3. Events and stunts are a tactic, we will talk about these later, people often jump straight to these rather than plan a campaign. |  |
|  | Slide 5 | **Activity B**   * (NB. Activity A will have been introductions – see handbook) * Do as a **group activity** and talk about current noticeable campaigns. It might be useful to use the whiteboard in Zoom * Ask what made those campaigns particularly noticeable * What is it about good campaigners that make them good? * Why have some newsworthy campaigns failed or been limited? * Some recent examples for possible discussion * Brexit * BLM * Just Stop Oil (good controversial one! Is it a good campaign?) * Free School Meals * Justice for Hillsborough * Climate Strikes * LGBT in the military apology * David Attenborough * Greta Thunburg * Marcus Rashford * Dame Kelly Holmes | Capture ideas on flipchart or online whiteboard. It is possible to use Jamboard as well |
|  | Slide 6 | * Go through the slide. It is important here to be clear that this is their campaign and while organisers will support as much as is needed it is for them as reps to lead. They may want to make notes on their thoughts on this to refer back to when they are planning. |  |
|  | Slide 7 | * It is important to emphasise that campaigns don’t just happen they require planning and resourcing to be successful and they may span a considerable timescale or be broken down into linked time frames. They will need evaluating and re-thinking along the way. This is why it is important to have goals, a strategic plan and a timeline. Campaigns are not a single event or a focus on one platform e.g. social media. |  |
|  | Slide 8 | * This training focuses very much on how to plan an effective campaign but will also talk about how to keep things on track in the delivery stage. If the planning is done well then delivery will follow naturally. |  |
|  | Slide 9 | * This training introduces a framework that can be used to plan any campaign, now or in the future.. hey do not necessarily always go in the same order and some parts of the campaign will be happening in parallel. For example, goals and targets may happen alongside the identification of the issue and then a campaign team built around that. The point is if the campaign team think about and utilise all these building blocks it will greatly aid the success of the campaign. It is also useful for those new to campaigning and/or new to planning their own campaigns as it provides a structure to help them. * You could use current campaigns such as those mentioned before (BLM, Free school meals etc) to highlight this. |  |
|  | Slide 10 | * Go through this with the group and ask them to start to think about good issues. Give some examples of local campaigns if you can or go back to some of the national/global campaigns discussed at the beginning. * Get them to think about how they know the answers to these questions and if they don’t, how will they find out? |  |
|  | Slide 11 | * Some issues will be important to campaign on but not generally widely and/or deeply felt yet! This slide invites the discussion of how we can amplify these issues so that they fulfil the test criteria. Outline the ideas in the slide and ask the group to think of some ways they could amplify their campaign idea – they can take this through to activity C which is next. Visibility might also be key here so they should also discuss that. |  |
|  | Slide 12 | * Setting a goal is absolutely crucial to frame the campaign and to keeping the campaign on track. Groups wishing to campaign often have really good tactical ideas but forget what the aim of the campaign is. Having a clear goal shapes the campaign and helps with developing a campaign strategy. Wording is also important - Eg. A goal of "gaining a 15% pay increase" is very specific and easily lost (what if the pay settlement is 14%?) whereas as goal of "achieve a significant pay rise in line with inflation" gives some room for manoeuvre when it comes to claiming a win and associated branch communications. |  |
|  | Slide 13 | * Campaigning can be around workplace issues or branch development issues, the framework is the same. * If a campaign goal is very large it can be broken down into smaller campaigns that are more manageable and less overwhelming. For example: a campaign to “stop bullying and harassment” is vague and also a huge undertaking so it is difficult to know where to start but an initial campaign to create and support a new B&H policy or make the grievance policy fit for purpose has a specific goal and can then be used to launch the next campaign in the chain. |  |
|  | Slide 14 | * **Activity C** If this is a small group do this as a tutor lead exercise (on the main screen for online). For larger groups split into groups of 3-4 (using breakout rooms if tutoring online). If working in groups ask each group to nominate a spokesperson to share their issue and ideas when the group comes back together. * Direct them to make notes in the workbook for future reference. * Ask them to decide on their campaigning issue and test it against the list on the previous slide (this is replicated in the workbook for them to refer to). Does the issue pass the test? If not can it be amplified? * Highlighting weaknesses and arguments against at an early stage will help with formulating counter arguments later. * For group work get them to feedback when they return to the main group. |  |
|  | Slide 15 | * This part of the training will likely need more thought and will form part of their action plan for future meetings so at this stage go through the slide and emphasise the following: * Good way to involve new members and encourage new activists * Identifies natural leaders * Need to be clear about a network of activity. * Need a clear communications strategy both between team members and for communicating the campaign more widely. |  |
|  | Slide 16 | **Activity D**   * Start with what skills you need * Think about what areas you need to access and where you need leadership * Include potential activists you want to bring into the branch structure. * This activity could be done as a list of things to think about at the next campaign meeting. * **It is possible to skip this activity and give it to the group for “homework” i.e. the next campaign meeting. Do this if it is obvious that this requires more thinking about. This may well be the case for specific campaigns rather than theoretical ones** |  |
|  | Slide 17 | * You might really need to reinforce the difference between a message and a slogan! While the slogan is the fun part it needs to have a clear link to the message and part of their initial campaign should focus around linking the meaasge and slogan in people’s minds. Having a graphic that links both to the slogan and the message might be useful too. Black Lives Matter is a really good example. The slogan instantly tells you what the campaign is about and is now tightly linked with the message about what the campaign is about and what change is being called for. The graphic links to both and has historical resonance as well. |  |
|  | Slide 18 | * It is really just a case of going through the slide here so they are clear why the campaign message is important to develop as it helps people to understand the campaign but needs to be contained in a short message. |  |
|  | Slide 19 | * Facts don’t always work doesn’t mean we are asking them to lie! It means that facts and figures don’t engage people as much as emotions do. What Marcus Rashford did with free school meals and child poverty is a good example of this. His campaign is driven by his own experiences and people’s reactions to children going hungry not by figures on child poverty. It has engaged people who are not directly affected by the issues by engaging their sense of unfairness, which is clever. * Anticipating opponents arguments allows you to have a ready counter argument. * It is sometimes difficult not to go over to the opponent’s arguments particularly when you are opposing change but by doing this you are focusing on what the opponent wants to do rather than what you want to do. An example is the slogan “Stop the Cuts” – anyone who didn’t know anything about public sector cuts will immediately ask “what cuts?” “Why are they being made?” which focuses their mind on what your opponents are doing and why. A slogan like “Fund the public sector” will better allow you to talk about your arguments. It’s a subtle thing but useful to try and do. |  |
|  | Slide 20 | * If group working send them back to their original groups to work on a message and slogan for the issue they tested earlier. Remind them that although the slogan is the fun part they need to think of their campaign message too and make sure that the two link together. They also need to think about how they are going to communicate the two and link them in people’s minds. * **The test of a good campaign message** * It fits the situation. * It appeals to the broader community. * It unites the workers (members and non-members). * It is not a slogan * Come back to the main group and discuss ideas if working in groups. |  |
|  | Slide 21 | * The target is “simple” – it is the person or small group of people who can affect the change you want. Obviously it’s sometimes not that simple but presenting it as such will get the groups to really think about who is involved in decision making and who they need to influence. This may require some research! Some of the people they think of as targets might turn out to be secondary targets. * In a similar way the lines between secondary targets and allies might be blurred – the defining difference is that allies are those who can be trusted with part or all of your plans. For example, you would share the date of a twitter storm or flash mob with allies but not with secondary targets. * Secondary targets are those people who have influence over the target. |  |
|  | Slide 22 | * This is an illustration of where different people will be in relation to your campaign. The idea is to move people from right to left at least one box. It is also an opportunity to discuss who you focus the campaign on outside of the target(s). Leading opponents and active opponents are unlikely to come right over to your side so, although the natural instinct is to engage with them and change their mind, time might be better spent getting passive allies to become active allies or those in the “neutral zone” to become supporters. Leading opponents may become passive if your arguments are compelling enough but this should not be your main focus. * The Brexit campaign is a good working example of this theory. |  |
|  | Slide 23 | **Activity F**   * Quick exercise to get them thinking about this. Send to original groups if doing this as groupwork. Use breakout rooms again if working online. * Feed quick answers back in the main group and then highlight any issues it threw up. * This will also highlight any research they need to do if they don’t know and will add to their action plan. |  |
|  | Slide 24 | * This is quite difficult to explain but needs to be made clear. People tend to think tactically and group members’ previous experience with campaigning may be only by being involved with individual tactics, however, the aim of this course is for them to take the lead (with support if necessary) so they need to think strategically first and then fit the tactics into that strategy. Also tactics are more fun! * There are some ideas of tactics in the workbook to get them started if they need help. |  |
|  | Slide 25 | * The “vulnerabilities” of the target refers to what issues drive them or the organisation. For example, an organisation heavily focused on H&S will be more likely to engage on a campaign that is given a H&S focus. Another example might be the reputation of the company or of the target. |  |
|  | Slide 26 | * Once the goals are set and the general plan is thought through then planners can start to think about how they escalate the pressure on the target. It is generally best to start with low involvement tactics and escalate to more involved ones. * The recent PS pay campaign is a good example of this as the tactics started with a call to action to sign a petition online (low intensity) then asked members to email their MP (slightly more personal involvement) then visit their MP’s surgery (bit more involved) then escalated to voting for strike action (potential to take action), taking strike action (definite action) and finally joining a picket line (visible action). * It is sometimes useful to think about your most intensive tactic and work backwards. |  |
|  | Slide 27 | * Reminders of action points and that they need to build evaluations into their timeline especially after each tactic/event. Why will become clearer in the section on structure tests. |  |
|  | Slide 28 | **Activity G**   * This is where they pull all their planning together and make a draft timeline of events. They will then be asked to put together a short (5 minute) presentation on their campaign basically the headlines for each of the building blocks and a brief timeline to show how tactics will escalate. It only has to be a draft but is designed so that they can go back to their branch with a draft plan. * Highlight that they may need to make this more detailed and add to it at their next campaign meeting. Make it clear this is laying the groundwork for future meetings. * The timeline will be a living document that will change as early tactics are evaluated. * The timeline will also include campaign team meetings, evaluation points, communications events. * Resources are people as well as materials. |  |
|  | Slide 29 | * **Lunch break building in time to work on their presentation.** * **For bespoke training, it is also possible to stop here and come back to the rest of the training after subsequent planning meetings once the team are ready to launch the campaign in real life.** |  |
|  | Slide 30 | * **Presentations and feedback from the other groups** * **If this is a bespoke course then this can be used as a recap session.** |  |
|  | Slide 32 | * Once their plan is in place branches should use the campaign checklist to check they are ready and build additional features into their timeline e.g a mapping exercise. * They could also build in any training for reps where needed before embarking on the campaign e.g. joining conversations training |  |
|  | Slide 33 | * As the planned campaign swings into action branches need to know how  strong the engagement  with the campaign is and they need to monitor how the campaign is progressing, this can be done through measuring support using tactics as structure tests and by charting collected data. This section of the training takes the group through what this looks like and how they can do this in a real life campaign. * This slide gives some ideas for things they might want to collect data on, monitor and chart. * Collecting this data also allows next steps to be followed. E.g. UKAEA petition – 1000 signatures in a branch that had 500 members – were the other 500 followed up to try to progress them into membership? |  |
|  | Slide 34 | * Each tactic in the campaign will in effect be a structure test and should be evaluated after each one. Therefore data needs to be collected and processed. This will be easier for ,say, a petition where you can see who has signed and compare to a member list to spot non-members but will also mean that you need to remember to have a sign in list at meetings or note who wears a lanyard. Use this slide to explain this and why it is important. This will become clearer in the next activity. |  |
|  | Slide 35 | **Activity H**   * Simply a preparation for the activity but will embed the idea of charting and structure tests |  |
|  | Slide 36 | * This is an example of some data that shows a campaign that is going well. Members are participating in the actions and engagement is remaining steady. * Examples of questions that this data raises are:  a) why does Sue not attend meetings (ask her) do the branch need to vary meeting times? Is there an equality impact here? * b) Why doesn’t Ash wear a lanyard – does visibility need to be done differently in Ash's department (H&S issue) or is there a reason he doesn’t want to be visible at a TU member (fear of bullying)? * This data might highlight other issues as well as relate to the campaign. |  |
|  | Slide 37 | * This is an example of some data that shows a campaign that is flagging! * Points to discuss * The campaign is stalling * Do you need to revisit whether this is a good issue? * What are the barriers for members? * What are the positives? * What about Obi? |  |
|  | Slide 38 | * Here is a real life example where a branch have kept a chart of engagement that everyone adds information to each time they meet. * This can be a valuable way to share the workload and the charts can be stored securely. * This could also be done as a shared XL document (protected to only allow certain people to edit) |  |
|  | Slide 39 | * Highlight that any GDPR concerns can be discussed with data compliance officer, Tracey Hunt and they might want to make this part of their planning if they are concerned. * Otherwise the slide s fairly self explanatory |  |
|  | Slide 40 | Simple reminder to progress people |  |
|  | Slide 41 | Final tips |  |
|  | Slide 42 | * Grow the union through campaigning * Make what you are doing is visible * Advertise wins!! Or even advancements. |  |