

GENERAL ELECTION REVIEW 2024



General Election Review 2024

Foreword from the Chair	3
Introduction	4
Chapter 1: Laying foundations	5
Chapter 2: Candidates, agents and organisers	8
Chapter 3: Political Strategy and Positioning	14
Chapter 4: Membership	17
Chapter 5: Fundraising	20
Chapter 6: Targeting strategy	23
Chapter 7: Diversity	26
Chapter 8: Misc	28

Foreword from Tim Farron MP, Chair of the General Election Review

I was delighted to be asked to Chair the General Election review and will undoubtedly have had an easier time of it than my predecessors in 2010, 2015, 2017 and 2019. This review which kicked off in earnest in late Summer 2024 would have not been possible without the support of the panel appointed to aid this process and I give my most heartfelt thanks to them all and to Vinous Ali who has supported the panel in its work and done so much of the work in ensuring that this review was rigorous and that our findings were - in our view - the right ones!

With Ed at the helm, the party has exceeded all expectations, returning 72 MPs of whom it is my honour to be one. We elected an excellent team, and it is a joy to be alongside such an impressive group of colleagues. This review is therefore, perhaps unsurprisingly, a playbook to guide the party to future successes and a call to action to fix those issues which rumble on and threaten to undermine our best laid plans.

Despite our success, which has returned the bright beacon of liberalism to Parliament, we should be under no illusion as to the choppy waters we sail in. Across the UK and further afield populism and extremism is slowly becoming the norm rather than the exception. I believe that we as Liberal Democrats have the antidote.

Community politics is in our blood, yet we take it for granted and at times some of us can be sniffy about it: it's small beer, it's just pavement politics, it's just a dolled up set of election tactics.... But nothing could be farther from the truth. The antidote is to build deep relationships with our communities, to serve them at an immersive level, to 'keep in touch and get things done', to win trust and to continually earn it. There is no human silver bullet to deal with the evil that is seeping into western politics, but we Liberal Democrats have found the closest thing to it. If we are to defend our country against the rise in populism, we will do so by forensically loving and serving our neighbours so that they do not feel the need to reject 'the system' and opt for the extremists. Sometimes the most important lessons are the most obvious ones: we need to redouble our commitment to genuine community politics if we are to rescue our country from the abyss. There is no calling more noble.

In this review we examine how the party can best support our MPs, PPCs, councillors and local campaigns teams to fulfill that calling by giving them the best chance of winning and winning again so that they can serve our communities and build a fortress against populism.

My thanks once again to the panel who have contributed so much to this process and to all of those who contributed their thoughts whether through surveys, written evidence and feedback, interviews or providing relevant documents and data to support us to reach our conclusions.

Introduction

The following has been written in a period where the parliamentary party, federal HQ, our volunteers and activists continue to grow accustomed to the Liberal Democrats' return as the third-party in British politics, a role we have not held in almost a decade. We do so thanks to the outstanding result at the recent election which saw the party return 72 MPs - 61 seats more than in 2019 and higher than at any general election since 1923.

It is perhaps unsurprising therefore that this review focuses on the strategies and actions that contributed to this success while maintaining a critical eye on areas for improvement to ensure the party not only holds these 72 seats but makes further gains at the next election.

This is not an exercise of back-patting and self-congratulation, although there are clearly things the party - and key individuals - got right and should be praised for. The panel's sincerest wish is that the observations and recommendations made in this review:

- make crystal clear the key elements that enabled success
- prevent backsliding into the 'old way' of doing things, and
- support the party to take the next step to secure continued growth.

Similarly, we must also acknowledge that our success in 2024 has come at a cost, albeit a cost the panel believes was worth paying. The party lost 229 deposits, did not significantly grow our membership, barely moved the dial on vote share and has relatively few second places to contend from next time. Ultimately, this will make growth harder; however, the discipline and commitment shown by the leadership and wider team and the new 'base camp' from which we begin this next climb makes us optimistic for the future.

We are grateful to everyone who gave their time to support the panel in building these conclusions including the 3,000 responses we received to our survey, the thoughtful contributions received via our dedicated mailbox, the dozens of in-depth interviews we conducted over the last 12 weeks with staff, volunteers, candidates, AOs, and agents and the documents provided to us.

The review takes a number of key areas in turn, making recommendations on each:

- Candidates, agents and organisers
- Membership engagement
- Fundraising - across the Party
- The delivery and implications of the Target Seat Strategy
- Political Strategy and Positioning
- Diversity

However, we start in the aftermath of 2019, where the seeds for success were sown.

Chapter 1: Laying foundations

The outcome of the 2019 General Election was a bitter disappointment to the party and everyone who worked tirelessly on it, often without recognition let alone reward. We emerged with one seat fewer than we had achieved in 2017, we lost our party leader and failed to capitalise on the Brexit momentum despite a fantastic set of local and European election results earlier in the year.

It would be an understatement to say that party morale was at rock bottom with grim repercussions on the campaigning machinery in its widest sense - from membership and fundraising to recruitment and retention of staff, volunteers and members. Yet, thanks to strong leadership, a clear strategy and iron-fisted discipline the party enters 2025 with strength, optimism and momentum on its side.

From the evidence we collected through interviews it is clear that these foundations were laid by a few key staff who continued to provide robust scaffolding over the next four years enabling the laying of every subsequent brick that ultimately resulted in the towering victory achieved on 4th July 2024.

They are Mike Dixon, CEO; Dave McCobb, Director of Field Campaigns; Rhiannon Leaman, Chief of Staff to the leader; and, Olly Grender, Director of Communications.

This small, tightly-bound team came up time and again as the single biggest contributor to the Liberal Democrats' success. It is our observation that they did this by avoiding the usual pitfalls that other small, senior teams have been criticised for in past reviews, e.g the 'Wheelhouse' executive in 2015 or the inner team in 2019; namely: group-think, a lack of accountability and transparency and failing to take others with them.

Instead, interviewees were unanimous and generous in their praise of this team for their openness to challenge, the forthright and regular internal communications with the various party structures and the membership more broadly and the way in which they secured and built a cohesive one-party approach from very early on (more on that later).

It is undoubtedly true that early preparation was key. In 2017, following the snap election then-CEO Nick Harvey, marking the publication of the executive summary of that election review, remarked *"the snap election of 2017, coming just two years later and out of left field, meant that we were still recovering from 2015 and had not had much chance to implement many of those changes."*¹ It is clear the party has learnt its lesson that sometimes slow and steady does not in fact win the race. There was a palpable sense that the next election could wipe out the party and from the evidence this panel has taken we feel that had an election been called even two years on from 2019 the party would have been in a strong position to fight it.

Firstly, the party moved quickly to set up a clear traffic light system to measure progress and implementation of the recommendations made by the Thornhill Review of 2019. Tracking systems

¹ <https://www.libdemvoice.org/introducing-the-general-election-2017-election-review-58284.html>

were put in place for each recommendation with clear 'due dates' for delivery and responsibility assigned both at a strategic and operational level. Reports to FASC and Federal Board provided both key focal points/milestone moments and acted as a forcing function to drive change and action. It is also worth noting that the Thornhill Review precipitated a number of changes to the party's governance structure; these were not without controversy but clearly contributed in setting up the party for success. Where recommendations were not implemented fully we have seen similar challenges and criticisms have resurfaced in this review.

Secondly, in early 2020 a new strategy paper, *Winning at Every Level* set out the party's approach for the duration of the next parliament. Out of this came performance indicators that acted as a rallying point and ensured coherence - a break from 2019 where different parts of the party pursued different strategies and set different standards for what good looked like.

Finally, people were brought together early under a shared mission, breaking down silos between HQ and Parliament, between different staff teams e.g. policy, comms and campaigns within HQ and between Federal and State. Crucially this was then not up-ended when it came to the short campaign:

"It's the first time where the people who have built the organisation and the team during the parliament have just been trusted to get on with the job during the campaign. That is the single biggest thing I would say we definitely have to do again...we made a conscious decision to basically build up, not put on top of - so if we were bringing in extra people we brought them in to do specific jobs that were needed under people who have been systematically working on that stuff for a long time." (Dave McCobb, Director of Field Campaigns)

Or, as Mike Dixon, CEO put it: *"when the General Election was called there was no big shift, just a gear change to move faster and at scale"*.

This 'one party' approach was flagged time and time again during interviews as being critical to success. Ultimately, this seems to have come down to internal communication more than anything else. This applies at every level, for example, from open responses to the review panel's survey it was clear that for our most engaged members and activists the long-form explainer emails from the CEO were very well received and helped encourage engagement with the party and understanding of the strategy and vision.

Recommendations:

Continue:

- **Strong and structured information flows:** From very early on in the Parliament and throughout the short campaign there was a constant but meaningful flow of information out from the centre. This built trust and a sense of shared mission.
- **Systematic monitoring of recommendations:** reports like ours have too often been left to

gather dust or been implemented in haphazard and uneven manner. The systematic approach to implementing the recommendations from the Thornhill review should be best practice helping to drive change and build trust and accountability going forward.

Build:

- **Early preparation:** while perhaps obvious it is clear that preparing for this election early was key to success. This requires a shift in mindset and culture whereby campaigning is a constant and all elections - Welsh, Scottish, English Locals, Mayoral, etc. fit within a singular strategic framework with the baton being handed to a different lead and/or leader to deliver.

Address:

- **An over-reliance on a few key staff:** the party was lucky in 2024 not to suffer from senior staff absences during the short campaign - as was the case in 2019. It is impossible to know what the impact of this would have been. A business continuity plan should be drawn up to ensure operations could continue in the case of key staff absence; in particular there should be clear deputy functions for all those at Director level.
- **Succession planning:** there is no guarantee that the same team will be in place for the next election. We should not be afraid of discussing succession planning to ensure any new team is set up for success.

Chapter 2: Candidates, agents and organisers

Candidates, agents, and organisers are the backbone of every successful political campaign. They are the ones who connect with voters on a personal level, listen to their concerns, and communicate the party's message, translating it from national to local. They are also responsible for the day-to-day operations of the campaign, such as scheduling events, managing volunteers, and fundraising all while ensuring compliance with electoral law and adherence to various codes and ethical standards.

Without the hard work and dedication of candidates, agents, and organisers, even the most well-funded and well-organised campaigns would fail - something the Liberal Democrats are no stranger to. They are the ones who make the difference on Election Day, and they deserve all the credit for the victories they help to achieve.

Behind them sits staff and party structures that support each element and ensure coherence and consistency, direction and focus. Despite the overall success of the party in 2024 there are clearly elements of this structure that are broken making the party's success even more astounding and jeopardising future success if not addressed.

First, the positives.

Party HQ made an early investment in field staff that was matched and bought into by the state and regional parties. In the first 18 months after the 2019 election staffing structures were consolidated giving not only a shared sense of mission but also helping re-build pipelines, establish routes for career progression and create a sense of camaraderie. This had been eroded since 2011, creating a fragmented structure that was siloed and leaving a central campaigns team that was too small to make a meaningful difference.

Early investment in field operations by HQ was used as the starting point for further growth and consolidation rather than the conclusion. Co-funded roles helped ensure close working between national, regional and state parties and professionalised the structure in terms of placing employees all on the same terms and providing an integrated staff structure. Expanding this model must be the ambition.

A focus was placed on agent and organiser training this was done both on the ground - particularly in the case of organisers - using parliamentary by-elections to train staff and hone campaigning techniques, as well as investing in regular training for PPCs, organisers and local party volunteers above and beyond training delivered at party conferences.

Complementing this with year-round online training and a new campaign hub which acted as a resource bank helped provide a holistic offer for all agents and organisers. The decision by the Electoral Commission to require that all agents pass an accredited one day training course acted as a forcing function to ensure agents new and old were refreshed on all things compliance and this was broadly welcomed.

There were also bright spots of best practice where a hub-and-spoke or 'cluster' model emerged allowing seats and local parties to work more collaboratively. This was true around Layla in Oxford, Daisy in St. Albans, Wera in Bath and Munira, Sarah and Ed in South West London (in terms of London and Surrey seats). These provided opportunities to exchange best practice, learning and peer support.

Case study: Oxfordshire

In Oxfordshire they worked as a strong, joint team with a joint campaign HQ, coordinated activities and *some* shared staff. Local on the ground efforts were made to direct volunteers to where they were needed most and there was a clear sense of a whole team effort across multiple seats using Whatsapp, Facebook and physical campaign offices to push that message. This was built over time using local elections as a driving force for building those strong joint working relationships.

This became critical as the election neared as some of the seats were less developed than others. By pooling resources more experienced volunteers and staff could offer support and guidance to those with less experience. There was sufficient scale to be able to deliver training on zoom calls, polling day prep calls etc. *Significant savings were made from joint purchasing on top of those available from the Campaigns Dept.* The held seat of Oxford West & Abingdon acted as a "centre of gravity"

The result - the Conservatives now hold none of the *Oxfordshire* seats and Layla Moran is joined by 4 new Liberal Democrats in the House of Commons.

Candidate support too was cited as a real highlight by many the panel spoke to: standard letters, resources and having quick, practical help at hand in a timely manner won praise across the party with one election veteran describing it as the "best it has ever been".

On the flip side, there was still a sense that if you did not put your head above the parapet you would be left to struggle in silence. Numerous people we spoke to said there needed to be more *regular* support for constituency organisers - particularly those who had never been involved in a General Election before; and, that there was greater need for structure in terms of checking in with people to ensure they knew what they were meant to be doing and how to execute effectively:

"It became apparent that 2 weeks into the campaign this organiser didn't really understand how to use miniVAN and if it wasn't for my hand holding they would have been left to their own devices"

While this did not deliver any disasters this time there is an increased risk for the future with so many organisers - who have experience - now moving into paid parliamentary staff roles serving

our 72 MPs. We need to replenish the pipeline of talent and ensure that we nurture and support incoming organisers who will probably lack the on the ground experience of the previous cohort.

Wellbeing and welfare checks while also helpful were limited in nature. If someone didn't pick up their phone it was unlikely over-stretched staff would have the capacity to check-in again in the near term. In addition, those doing these checks did not have any great level of training should issues be flagged. Support for candidates should be expanded but also properly resourced to ensure that any issues can be identified and dealt with early.

Perhaps more problematic, however, is the candidate selection process for Westminster elections which despite having been raised in a number of party reviews remains broken. Our volunteers are left struggling on, pouring more time and energy than many of us could or would, to ensure that come a general election the party has candidates to stand. It is to their credit that the Liberal Democrats fielded 630 candidates - 19 more than in 2019. We do them a disservice by not addressing the fragmented nature of our structures which results in an unhelpful separation between candidates and campaigns and bizarrely elections more broadly. It is only thanks to the dedication of an overworked volunteer team and frankly a miracle that this process has not tripped the party up. We should not deceive ourselves about the consequences of not fixing this.

For would-be candidates and local parties the frustration is clear. Would-be candidates are often left in the dark about when selections are taking place. This uncertainty means the party is undoubtedly missing out on talent. Evidence also suggests uncertainty can affect diversity - robbing would-be candidates of the time and space needed to give thought to what running for candidacy means.² Local parties too have expressed frustration with the process, for example being caught between central functions encouraging them to start selections and then being told there is no Returning Officer to enable this to happen at the State/Region level.

Clearly, work needs to happen to ensure there are enough Returning Officers available to enable selection to happen but the panel believes that this is intrinsically linked to the lack of a clear timetable for selections and a connecting thread between candidates and campaigns. To solve this we propose building on the oversight role that the Joint Candidates Sub-Committee (JCSC) has by giving it the responsibility of setting and agreeing a single set of approval and selection processes for Westminster candidates and setting an overall selection timetable for all seats.

It is vital that this committee is reformed to meet this new challenge i.e. giving all three States an equal stake. Timetabling selections in a more disciplined manner would have other positive downstream effects. For example, we received very positive feedback on target seat candidate training through a proper induction process by cohort - this could be replicated for others if similar 'batches' were enabled through timetabling.

To ensure that this is more than just a procedural change it is clear that a staff team would need to be resourced to help committee members deliver the requirements of the process and provide consistent resources and training for Returning Officers, Assessors etc. as well as professionalising

² Equal Representation Coalition

due diligence which again in 2024 took up too much time of staff members who, were it not for the political sensitivities and risks involved, should have been able to focus on other issues. We would propose that this staff team also has trained individuals who would be able to carry out wellbeing and welfare checks during the short campaign and even act as Returning Officers and Assessors themselves where necessary.

Finally, as a party we must do more to recognise those in development seats who not only work outside of election year to develop their seats but then go on to give considerable time and energy (often at significant cost to them) to help others win. As a party we are very fortunate to have wonderful candidates stand as representatives on our behalf - we must ensure that they are all equally valued.

The panel will be making more detailed recommendations on this point specifically in a motion to party conference.

Recommendations:

Continue:

- **Streamlining staff structures** to bring everyone under one umbrella thereby creating opportunities for career progression and more systematized joint working and collaboration.
- **Offering regular training and check-ins** to organisers to ensure that they are operating effectively.

Build:

- **A model for greater joint working between seats and local parties:** the party should develop its thinking on how to encourage seats and local parties to work together particularly where there is a held seat bordering development seats. Rather than leaving this to parties to forge their own path the party should develop clear guides of what this joint working could look like - whether a mentorship model, hub-and-spoke or other form of clustering.
- **KPIs for non-target seats:** having clear KPIs for target seats helped drive activity and set expectations, we believe that non-target seats would also benefit from having some expectation setting - in particular to ensure local parties and their candidates are aligned on what is reasonable to expect from one another.
- **Candidate training:** It is clear that candidates benefitted hugely from the resources put at their disposal during the course of the election, the feedback on this has been unanimously positive. We believe introducing more formalised training (online) covering all aspects of candidacy, outside of an election year, is one way to allow the candidates' hub to develop. Many candidates, particularly new ones (or candidates in a new tier) have little experience or understanding of what it means to be a candidate. An online training scheme covering

issues such as fundraising, building a team, wellbeing and resilience could be a one-stop resource that candidates could take themselves through at their own pace.

Address:

- **Fix candidate selection** by building on the oversight role that the Joint Candidates Sub-Committee (JCSC) has by empowering it with the responsibility of setting and agreeing to a single set of approval and selection processes for Westminster candidates and setting an overall selection timetable for all seats
- **Offer greater support to our volunteers** by resourcing a staff team that can help committee members deliver the requirements of the process and provide consistent resources and training for Returning Officers, Assessors etc. as well as professionalising due diligence, conducting welfare/wellbeing checks and acting as ROs and assessors where necessary.
- **Introduce a formalised employee assistance programme** for candidates, allowing access to external, professional mental health counselling.
- **Value candidates** who give their time and energy to standing regardless of what seat they are fighting.

Chapter 3: Political Strategy and Positioning

Stunts

90% of respondents to our survey of members, activists and interested parties agreed that Ed Davey's stunts ensured the party got coverage which it might otherwise not have. Effective (53%), attention-grabbing (52%) and fun (42%) were the three highest ranking words most closely capturing how respondents felt about the Lib Dem campaign. Attention grabbing also came first (23%) amongst a nationally representative sample of the population in a survey conducted as part of the review process.

While the strategy of showing Ed doing "happy, joyful things outside with people" matured in the short-campaign the reality is that this was a long-time in the making and part of a clear strategy to show the "*light and shade*" of Ed, as one senior staff member put it, and ensure cut-through and differentiation in the air war. It worked.

We start with the stunts because they were arguably the most memorable part of the campaign and did attract a fair amount of opprobrium. The strategy that underpinned this was driven by a few things that are important to note:

1. **It was authentic to Ed:** fundamentally Ed Davey is a fun, relatable, centrist-dad; portraying him as such was therefore simply asking him to reveal that side of himself.
2. **Brand:** Going into the election only a small fraction of the population could pick Ed out of a lineup, the team were very clear on the need to paint a picture of Ed before other parties portrayed their own version of him.
3. **A picture paints a thousand words:** as the fourth party in British politics very few column inches would be dedicated to the Liberal Democrats but if the party could serve the media with images they would almost certainly be picked up in a congested air war.
4. **Every stunt delivered a serious message:** Behind every stunt there was a serious policy message e.g. talking about sewage whilst falling into Lake Windermere. Ed might *do* silly things to give him the space to talk about serious things the British people cared about.

While this approach delivered results and was carefully monitored by staff to ensure that these visuals were effective and not turning-off the electorate more could have been done to explain the strategy particularly to key individuals who would be able to deliver that message far and wide and importantly to donors who had misgivings about the approach in the early part of the campaign.

The stunts were punctuated with moments of gravity - most memorably the party's election broadcast which showed Ed Davey talking about his disabled son, John, described by Tim Shipman as "packing a genuine emotional punch". It was referred back to continuously through the campaign on broadcast and offered balance to the lighthearted stunts offering the public and key opinion formers the chance to see Ed fully fleshed out.

Policy and Messaging

The party once again delivered a manifesto that was both comprehensive and well-received by institutions like the Institute for Fiscal Studies and Full Fact. The manifesto process itself was run in a timely manner and clearly benefited from having a full Parliament unlike in 2017 or 2019. With more MPs in Parliament this time holding more narrow portfolios it is likely the case that more will need to be done to secure their buy-in at the next election; however, the staff team are both aware of this and welcome further scrutiny and input.

While the party had policies on a huge number of issues there was iron-clad discipline on the key messages that the party focused on during the election: sewage, the NHS and cost of living. Unlike in previous elections, the party invested in a sophisticated polling operation early and was relentlessly focused on the priorities of the people. Unlike previous elections polling was complemented with qualitative research too whether that be focus groups that probed messages and candidate imagery or through the innovation of speaking to the top 100 canvassers to get real-time feedback on the issues being brought up on the doors. This was taken down to a local level with dedicated "listening conversation" days which centered on finding local angles on those key concerns ensuring that while there was consistency of overall message there was also understanding of the local context that would bring it to life and make it relevant to the people who lived there. As Ed's Chief of Staff put it,

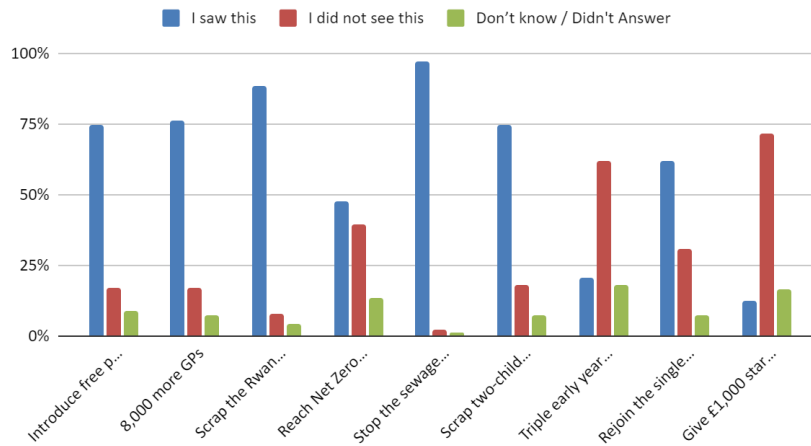
"It was these voters, in these seats - that's the focus".

The party clearly benefited from the fact that there was a stable policy landscape i.e. what mattered to people didn't shift much across the course of the Parliament, allowing the party to sharpen its message and repeat it to the point it was associated with the party. However, with the party not moving in the national polls it is evident that the leadership did have to hold strong against a desire to change tack - Ed himself said *"keeping to the strategy was harder than creating it"*. Having various points of evidence to point to helped them do this whether that was looking at all the MRPs coming in, national, public polling, private in-seat polling, focus group work, top 100 canvasser sessions or speaking to candidates, agents etc. Again, the leadership team took a very active role here:

"The very fact that those at Director level in this campaign were regularly knocking on doors in the run up to this, I think is a really significant and important thing."

Again, it worked. When asked, those who completed our survey were most likely to say they'd seen the party talk about stopping sewage spills followed closely by scrapping the Rwanda scheme, adding more GPs and introducing free personal care.

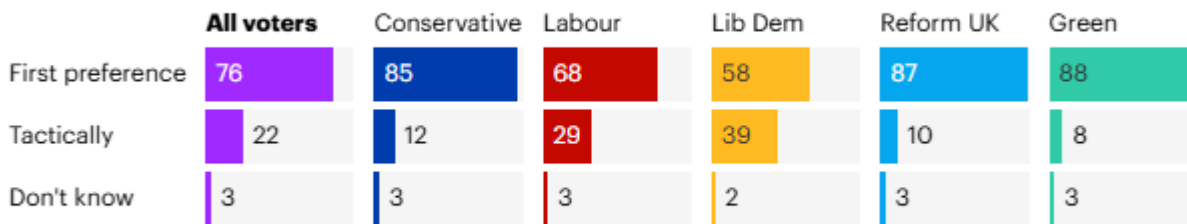
I saw this, I did not see this and Don't know / Didn't Answer



Pacts and Deals

The 2024 General Election saw the country clearly vote for change after 14 years of Conservative government. YouGov polling carried out just before the election suggested as many as 1 in 5 Brits would be voting tactically, rising to 39% of Lib Dem voters.

You said you intend to vote for [party] at the coming general election. Which of the below best describes why that is? %

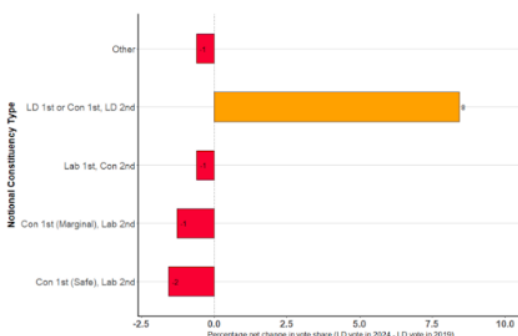


Answer options truncated in chart for brevity



22-26 June 2024

Figure 1: Change in the Liberal Democrat's vote share (2019-2024) in England and Wales



Source of the results – House of Commons Library Results Files for 2019 and 2024. Estimates for the notional constituencies compiled by Professors Colin Rallings and Michael Thrasher, Associate Members of Nuffield College, Oxford and Emeritus Professors at the University of Plymouth on behalf of BBC News, ITV News, Sky News and the Press Association

Three quarters of Britain's tactical voters reported doing so to try and keep the Tories from winning their seat. This did not require local or national pacts or deals. Much has been said about the efficiency of the Labour vote. However, it is clear that the Liberal Democrats' performance was also incredibly efficient (concentrating votes in areas we can win and not expending energy in those areas where we are not competitive). The data bears out this strategy - broadly speaking, our vote went up in the places where we were the main challenger to the Conservatives. It is worth noting that this was only possible thanks to the 2019 result which put us in 2nd place in 91 seats.

Pipeline

The party's ability to strategically build a pipeline that spans and builds across local, regional and national elections is critical to its success and in many ways sets the party apart from others - taking a grassroots, bottom-up approach. In Scotland, for example, the 150 Rising Wards - identified following the 2022 local election cycle with the explicit aim of building towards the 2027 cycle, has provided an anchor that has weathered the changing political winds. It worked well for activists and staff alike, providing a 'north star' in terms of shared purpose and motivation. Creating activity at this level - centred on Scottish Local Government Elections, has positive downstream effects for other elections (General, Holyrood) almost as staging posts. This should be continued and built on.

Recommendations:

Continue:

- **No pacts or deals:** it is clear to the review panel that formal pacts or deals with other parties are undemocratic, unnecessary and often counter-productive, we believe the 2024 election which saw a high-level of tactical voting demonstrates that the party is right to not pursue this strategy.

Build:

- **Data driven messaging and positioning:** the party benefited enormously from a stable backdrop to its campaign (anti-tory/change); however, a sophisticated programme of polling and qualitative work, whether through focus groups or convening the top 100 canvassers, ensured that we were listening to the public at every stage. With a new parliamentary cycle starting it would be easy to cut back on this research, we would urge the party to maintain and build on this - in particular ensuring we capitalise where possible on new sources of data coming from our 72 held seats.
- **Pipeline:** ensure that strategies are built with 'staging posts' in mind take advantage of 'focused minds', momentum and a sense of purpose.

Address:

- **Vision:** the party has done very well campaigning on clear issues whether it is sewage or care. These resonated with the public and could be easily localised. With a new Parliament and a flock of 72 the party must revisit and update our vision for the country (developed by the Federal Policy Committee and outlined in the first five pages of the 2024 manifesto for this election) to reflect both a changing world and our increased relevance.
- **Tailoring messages:** investing in a more coordinated approach to allow Scottish and Welsh parties to tailor national policies and campaign material proformas to ensure they can be used locally in a way that is appropriate and effective.

Chapter 4: Membership

There are three key membership factors coming through the review that are affecting the Party's ability to win future elections.

The first is that the Party is continuing to experience a long-term decline in membership numbers, that was only briefly reversed by the influx of new members between 2015 and 2019, primarily around the Brexit issue.

Historically, General Election campaigns have been a key opportunity to increase membership numbers, by sometimes 10,000 or more, but like 1997 our electoral success has not translated into any increase in membership.

Also, as before, the General Election was able to engage many non-member volunteers who contributed time and resources to successful campaigns across the country. However, again many are unlikely to convert their activism to paid-up membership. At a seat level our MPs and PPC would rather have an active volunteer than a dormant member meaning the incentives to sign up members are misaligned.

This decline risks long-term consequences for the financial stability and the campaign capability of the Party, as membership still provides significant levels of funding, locally, regional and federally, and the large majority of the activist base.

The Party needs to address how it identifies and converts supporters into donors and campaigners, and even members to address the longer-term risk to viability of the Party on the ground in seats across the UK. This is particularly true for areas where the Party has historically been weaker across the Midlands and north of England, and many areas of Scotland and Wales, but where we now have an opportunity to take on Labour and Reform.

The second issue is the member experience and in particular the capability of the Party to engage and retain supporters based on their preferences and motivations. The Party needs to be developing new approaches to engaging supporters, drawing on previous experience and that of other campaign organisations. This could include testing new cause-based propositions, offering relationships beyond membership and supporting local parties to increase their engagement of members and supporters beyond those who are traditionally active. We need to develop and integrate local, State and Federal Parties to each play their role in retaining members and activists.

The third factor is how the Party operates and therefore makes use of members/activists time and efforts.

The Local Party model constitution imposes similar requirements on all local parties, regardless of size, yet memberships in seats vary from a few tens to nearly a thousand. This means that there are lots of individuals carrying multiple roles, or councillors also acting as officers for their local party in absence of others to share the load. Also, that there are lots of executive roles not being filled, which impacts on campaign capability and morale. Then in some local parties there is a culture of

meetings with executive meetings, branches, sub-committees etc. There has never been an assessment of the effectiveness of the current local party model, but it is clear that time spent on local party internal-facing activity, draws time away from campaign-led activity to develop seats and win elections at every level and places a heavy burden on a small number of individuals. It is also likely that our current structures and operations inside local and regional parties act as a barrier to more supporters getting engaged in local activity.

We need to find ways to create a more robust journey from volunteer to member and address the bureaucracy associated with local parties to focus on campaign-led activities and recruitment and retention of members. Too many activists appear during elections and then drift away as they are not engaged by our current models of engagement, and the lack of data sharing means that it is very reliant on individual campaigners who disengage over time. And there are too many supporters who have not been converted into activists, whether as campaigners or donors.

We have an opportunity to refresh how we engage Lib Dem voters to take a role within our campaigns, in a way that works for them as individuals. We also have a chance to redesign our structures and ways of working to make the Party more focused on campaign delivery and accessible to more people.

Finally, the panel was asked to consider the recommendations made by Nick Manners in his review of internal elections (May 2024) - in particular those recommendations on term lengths for Federal Committees and 'splitting' positions on the ballot for elections of the largest committees e.g. electing in thirds or halves. On the former, and in the spirit of supporting a more active and engaged membership base, we agree that Conference should consider imposing term lengths for Federal Committees to ensure new ideas from diverse voices are given the opportunity to contribute to the party's democratic processes - we would hope to see this proposal taken forward and put to Conference.

With regard to splitting positions - in light of an assumption that more candidates will put themselves forward - we believe splitting positions could create more work for an already overstretched team. Instead, we propose that first recommendations on raising the threshold for putting oneself forward for nomination are enacted. Understanding what impact this would have on the length of the ballot can help inform whether a change in how elections operate is necessary.

Recommendations:

- The Federal Board to create a cross-Party Task and Finish group to create operating models for different local parties that increase the capacity for local campaigning, reduce the burden on key individuals and lower the barriers to engagement.
- In the context of the review of local government structure, provide more scope for smaller local parties to merge into a single accounting unit.
- The Federal and State Parties to provide more support for local party officers through

training, sharing best practice and offering mechanisms to connect with each other. This could include more training on volunteer recruitment and management.

- Review the Party's engagement strategy to create more supporter-centric products and communications to increase the conversion into a relationship including membership, and improve the retention of members who join based on a specific campaign.
- Create a new 'contract ' between different parts of the Party to increase the sharing of data on activists who are not members, so we can establish more effective supporter journeys to help retain and upgrade their support.

Chapter 5: Fundraising

The Party ran a successful national fundraising programme in the run-up to the 2024 General Election, which was delivered through a major shift in approach since 2019. However, in looking ahead we need to consider the fundraising capability of the Party across all levels.

Pre 2019, the national fundraising campaign was traditionally run quite separate from the rest of the Party's operations, and with little connection to activity in local parties. Meanwhile local parties have often struggled with fundraising, relying on events and small cash donations from members, with the occasional large gift.

In 2019 the fundraising team excelled themselves raising over £13 million in the last quarter alone (including an £8 million donation from Lord Sainsbury - the biggest single donation to a political party in UK history). Our failure to translate this into more seats and deliver on our Brexit ambitions (which drove much of the giving) made the fundraising team's job far harder across the last Parliament.

"A lot of donors were saying, 'No, I did that in 2019, and so I will give, but I'm not going to give as much.' So, we were slightly scuppered by the 2019 campaign and the promises that they made."

There were three major shifts in approach for the 2024 General Election, all of which should be built on over the next five years.

The first was the creation of the Liberal Alliance, described as "*genius*" by one interviewee, allowing the party to engage donors early with a clear offer. This brought in consistent donations and created a structured format of engagement with key stakeholders. This helped the party raise money and crucially raise it early, rebuilding confidence and providing a core team of senior volunteers, part of the Fundraising Board, to work with the central Fundraising Team.

The second was a major focus on improving fundraising relationships with local parties and campaigns. There was an effort to support local activity, connect candidates with potential major supporters and to work together to develop relationships with prospects. This led to the creation of a staff role to support local parties in their fundraising efforts, which was also hugely welcome, and as with the creation of a regional press officer, as critical in supporting our new MPs and future PPCs to build their own infrastructure and develop effective ways of working on both fronts.

The third shift was the decision by the Campaigns Department to build fundraising activity in the target seat programme and invest time in training MPs, and advanced and moving forward seats candidates in fundraising with major donors. This led to a big increase in local fundraising activity, with many candidates raising large sums for their own campaigns.

One area the Federal Party struggled with in 2024 was small donations, with a reported underperformance against the budget. There will be an internal review to identify the specific insights, however, it is clear the Federal Party needs to widen its small gift donor pool. There are three aspects to doing this, i) the different levels of the Party need to recontract on how they work

together on fundraising, with more transparency on decisions on who is approached and when, ii) we need to widen the data available to the Federal Party so those who are not engaged with their local party can still support based on their preferences, and iii) we need to assess the recent experience and capability in relation to fundraising at local party levels, as part of an overall assessment of the Party's capacity to grow over the next Parliament, particularly in our historically weaker areas.

What is clear is fundraising is a joint effort that requires the time and buy-in from senior leaders across the party, at local and State/Federal level. It is this engagement that has made the Liberal Alliance so successful. It is natural, perhaps, that fundraising falls down the list of priorities outside of an election year; however, the panel would argue now is the most important time to double-down on fundraising efforts, using the momentum of the campaign and the start of a new parliamentary calendar.

The party has always struggled to make seats self-sustaining. If we are to go beyond our 72 held seats it is clear that a huge amount of effort needs to be expended early in this Parliament to support seats and to help our group of 72 MPs become financially sustainable. Alongside this we need to build our fundraising capabilities across the Party to underpin our efforts to build our campaign strength in our current weaker area and challenge Labour and Reform in their heartlands.

Recommendations:

Continue:

- **Incorporate fundraising delivery** into campaign planning using KPIs, training and individual advice to support candidates at all levels of the Party to deliver income.
- **Liberal Alliance** worked very well and the Party should continue to dedicate senior time to supporting this over the course of the next Parliament, with a view to extending the model to other state and regional elections.

Build:

- **Acknowledge donors as activists** at all levels of the Party, as this recognises that for many this is their form of activism and we need to better appreciate the contribution of those who support us with both smaller and larger gifts. This needs to be supported by an effort across the Party to better recognise and value the efforts of those involved with local fundraising.
- **A stronger link** between fundraising and the Liberal Democrat Business Network, which has an impressive events schedule and attracts business people from across the economy, while the personalities running that network and the fundraising team work well together; this is reliant on those personal relationships. We believe there would be value in greater joint working to help build a stronger pipeline across the two.
- **Create a stronger training programme** and tools for increasing fundraising capability

across the Party, with support and guidance for weaker local parties, working through the regions to increase engagement.

Address:

- **Seat fundraising:** Mandatory training sessions should be offered to all MPs (and members of the Scottish Parliament, Welsh Parliament and London Assemblies) to equip them with the tools and fundraising strategies and ensuring staff offer strategy away days in the constituency to build on this and offer something more bespoke for the MP and their staff.

Chapter 6: Targeting strategy

The strategy to pursue the maximising of numbers of seats won as opposed to maximising our share of the nationwide popular vote, set the parameters for the campaign from 2020 onwards. In 2019 with Brexit as a key issue the party fought hard for every anti-Brexit vote, wherever that vote resided. Had this been a PR election that strategy would be hard to fault and our vote share did increase to 11.5% of the vote up from 7.4% in 2017. However, under the First Past the Post (FPTP) system, this strategy saw the party lose one seat. As discussed above, running a ruthlessly efficient campaign, in 2024 the party secured 72 seats with only a small bump in vote share (12.2%).

The setting of clear KPIs on:

- Volume of literature
- Volume of conversations
- Fundraising
- Size of team

helped everyone in HQ, in the field and in seats have clear metrics to measure against and ensure accountability and clear routes to moving up (or down) the target list. In that sense the metrics were strict but the targeting was flexible with seats able to move based on their performance.

Indeed, the achievement of those metrics were a clear measure of the quality of candidate leadership on the ground, given that they could only be achieved if there were capable people driving them. Local political context e.g specific issues/weaknesses with the incumbent/opposition are harder to factor in during a general election, especially where the Liberal Democrat candidate was not selected early enough.

There was frustration from some that the party did not add seats to the target seat programme as quickly as it might have done. It seems that the reasons for this were: our failure to select our own candidates early enough; a perceived lack of capacity to cope with additional target seats; and some residual caution following the over-targeting of 2019. Nevertheless, it is clear that the Campaigns Department was eager and proactive to see candidates selected early and to support and equip those who were 'making their own luck' on the ground even if they were outside the target seat programme.

Key to the winnability of any seat is the capacity, attitude and skill set of the local team, and the quality of the candidate - their tenacity, willingness to take advice and their ability to make their own luck. In ensuring that we identify the right seats in future, it will be increasingly vital that we focus on looking for those qualities in candidates and their teams, and directing our training to develop those skills.

Case study: Inverness, Skye and West Ross-shire

Marking the last seat to be declared in the General Election, Inverness, Skye and West Ross-shire

also represented the largest swing of any constituency. This was not luck. Angus' record as a hard-working councillor, active member of the community and well regarded businessman was of huge benefit but more so was his ability to build a strong network of volunteers (mobilising 140 volunteers to hand-write letters for example), knock on doors - 32,000 doors knocked before the election was called, and rebuilding the local party from scratch all inevitably made the difference. The leadership and focus would not have been captured by data alone

Recognising this may be even more crucial for the next parliamentary election where the anti-Conservative pull the party relied on is likely to be far weaker. The national weather helped us in 2024, and we cannot rely upon that happening again. For us to win and move forward, each of our 72 MPs will need to be able to build teams and campaigning infrastructure capable of winning in far less clement political weather.

Labour facing seats

Labour are 2nd place in only two of the 72 constituencies now held by Liberal Democrat MPs (and even in those two cases they were seats won against the Conservatives who subsequently slipped to third place) and hold just 6 of the 27 constituencies the party came 2nd in 2024 meaning our battlegrounds remain very Conservative facing going forward. Nevertheless the party will want to have a message on Labour as the party of Government come the next election and this will likely form a key strand of its narrative as the 'effective opposition'.

Many of those who took the time to share their views with the panel expressed frustration that there wasn't a clear Labour-facing message and that the campaign was focused broadly on Southern and less-urban seats. A targeting strategy that is worth its salt must be as the name suggests, targeted. However, given that this strategy was set very early on in the Parliament it seems there was a missed opportunity to build collateral for those working in Labour-facing and/or more urban seats early.

Here, it is worth mentioning the relationship between HQ and ALDC. From evidence we took, it is clear that this relationship could be further strengthened to ensure better coordination, a clearer division of labour in the short campaign and more information-exchange. In particular, given our historic local election victories over the last Parliament and our success at the General Election it is clear that there should be closer working between councillors and MPs/PPCs than ever before.

Volunteer and activist management

The party did well to ensure that volunteers and activists were clear about where time and resources should be funnelled. Clear communication with candidates and local parties ensured that a coherent and unified message was delivered 'down the chain' to encourage people to move to where boots on the ground were most sorely needed. Feedback received both during the consultation session held at Autumn Conference (2024) and in the survey work carried out by the panel suggested there was a frustration felt by some that if you could not travel to a target seat your willingness to volunteer was overlooked. This is despite the fact that there was a structure and

apparatus in place for those who could not travel to ensure they felt equally valued and were given alternatives. People were directed to telephone banking with thousands of calls made from home-based volunteers and these efforts were supported by a staff member and a number of invaluable volunteers. This discrepancy suggests that more should be done in future to ensure other forms of volunteering (beyond canvassing and delivering) are communicated out to members and volunteers.

Recommendations:

Continue:

- **Transparency:** having clearly defined metrics helped create the basis for an open and honest working environment while acting as a motivator for local parties and candidates
- **Disciplined targeting of field resources** ensuring that this is funnelled to those seats we have the greatest chance of winning.

Build:

- **Build the qualitative element in the system.** The party must be mindful of the need to integrate candidate selection with the identification of winnable target seats, looking to recognise key leadership skills in candidates, systematically developing those skills, identifying those with the right attitude and the strongest teams, alongside recognising local political context in order to target effectively.

Address:

- **The relationship between HQ and ALDC:** We propose a new memorandum of understanding (MoU) to be drafted between HQ and ALDC to set out clear ways of working. This should include, but is not limited to creating mechanisms for better information flows and tasking roles and responsibilities more clearly and assigning a 'lead' when there is overlap.
- **Volunteer and activist management:** not everyone can travel to a target seat - those with caring responsibilities, accessibility challenges and/or work or personal commitments may find this difficult. The party ran a very effective telephone campaigning operation which allowed us to use the talents and passion of those members and we must continue to ensure that every volunteer is made to feel valued and that everyone who wants to contribute to the campaign can.
- **Labour-Facing and Urban Seats:** The Party must also develop a specific strategy and messaging [to ensure that we are in a better position to fight] for Labour-facing and urban/inner-city seats.

Chapter 7: Diversity

The parliamentary party after the 2024 election is more diverse (table below); however, the party still did not meet its own goals.

Total number of MPs	Female	BAME	LGBT+	Disabled	2 or more characteristics	Young Liberals
72	32 44.4%	5 6.9%	8 11.1%	3 4.2%	4 5.6%	1 1.4%

There were signs that this would be the case. For example, the main area of weakness with regard to the implementation of the Thornhill Review was stated by one person, close to the oversight of the implementation, as being on candidate diversity. In January 2024 it was viewed as being too late to make a meaningful difference and this issue was rolled into the party's wider risk register.

Furthermore, women only made up 28% of the overall candidate list, indicating a greater gender imbalance throughout the party than is represented in the elected parliamentary cohort. A number of factors making candidacy less attractive for women have been identified including workload, which has been addressed in earlier sections of this paper.

Online hate directed at politicians has intensified in recent elections, with women, LGBTQ and ethnic minority candidates experiencing heightened levels of abuse. Candidacy is then doubly unattractive in under-resourced areas, with little to no framework in place to buffer them from abusive messages. Recognising candidate safety as paramount throughout online campaigns is essential, particularly for those at the intersection of protected characteristics.

Online hate, compounded with welfare and workload issues has the potential to greatly damage mental health, which again is more acute for diverse candidates. While peer support can help ease the problem, informal networks are not a substitute for counselling and a robust, internal support framework.

If the party is to continue to grow we must be able to:

- Draw on the pool of talent of the ethnically-diverse communities as well as ensuring gender parity within the panel
- Ensure the parliamentary party and other elected officials are, as a cohort, representative of the communities they serve.
- Produce a plan/campaign for attracting and creating a more diverse membership.

Recommendations:

- Create a new mentorship programme pairing MPs with diverse candidates in **every tier** to share best practice, offer peer support and empathy and in other ways act as a mentor from someone who has “been there before”.
- Re-introduce women-only candidate approval days and introduce dedicated days for ethnically-diverse candidates to ensure approvals are not a ‘blocker’ in taking forward candidacy.
- Renew focus on ethnic diversity - particularly among our local government base which we know is often the start of a journey, and ensuring that the party is actively canvassing in more ethnically diverse areas (overlapping with the need to ensure the party does not retreat in urban/metropolitan geographies).
- Candidate safety should serve as a foundational principle in all online campaigning. This includes developing and sharing resources to address and build resilience against online abuse and safety threats, such as;
 - Local party guidelines outlining an ideal framework for digital engagement, ensuring online campaigning responsibilities are shared among the team.
 - Signposting to external charities for additional support when needed.
 - More flexibility for a shorter campaign period

Chapter 8: Misc

Through the evidence collection process we heard from hundreds of individuals and while we have distilled our key learnings in the themes explored above some did not neatly fit into any of the groups but nonetheless are worthy of acknowledgement and action. What follows is a laundry list of issues that were flagged with the panel that we feel could easily be rectified ahead of the next election. In no particular order, they are:

1. **Office space in HQ** - at its heart HQ exists to fight national elections. It is therefore no surprise that headcount dramatically increases during the period of a General Election. All those we spoke to who worked from HQ were overwhelmingly positive about the atmosphere 'in the room' and the welfare provisions made for staff and volunteers alike - cooked meals, snacks, equipment etc. However, one issue that surfaced was the lack of desk space, which was resolved but late in the day. The ability to scale up space to enable teams to come in 5 days a week to work together and collaborate should be secured quickly and alternative arrangements made in the interim to allow teams to work together.
2. **Compliance landscape for overseas activity:** the Election Act (2022) extended the franchise to an additional 2.1 million Brits living overseas. Liberal Democrats Abroad hoped to seize on this opportunity to register potential overseas Lib Dem supporters and add their weight to the campaign. However a number of LDA's activities were curtailed due to uncertainties around compliance. With a fair run to the next election we hope that the compliance team work with all the relevant parties to ensure there is greater clarity from the outset come the next election.
3. **Bulk buys for literature:** this was seen as vital for a number of reasons: securing message and design discipline, allowing more people to access and make use of this material, motivating fundraising - we would recommend continuing this practice and expanding it out as far as possible.
4. **Leaders calls:** bringing together the leadership teams in England, Scotland and Wales was valuable to ensure coordination and provide opportunities for challenge and feedback. These should continue in peace time.
5. **Scottish and Welsh media:** spokespeople should receive a briefing from the Scottish/Welsh parties before doing Scottish/Welsh media as part of a media round. It's not the same as doing regional media in England and should not be treated as such.