2019 Election Review
REPORT

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Introduction from the Chair of the Election Review, Baroness Dorothy Thornhill.

Writing this during lockdown while our country is dealing with all the ramifications of Covid-19 our 'little local difficulties' are put into perspective. Nevertheless if we are to rebuild and become a liberal force for good in the country, post this pandemic, our critical work must continue.

Firstly can I thank the 20,741 of you who replied to the original short survey which pointed the way we needed to go in the main body of our work. In addition we are grateful to all of you who wrote submissions and the unknown number who attended local party deliberations, sat on round tables and for those more closely involved with the election who with honesty and trust gave your time to be phoned or interviewed in person. In all we have had well over 300 separate contributions. Many from individuals in a personal capacity, but also reports or collated information from the representatives of official party bodies, elected representatives, constituencies, and other organisations or teams, at all levels of the party.

What was clear very quickly was our massive disappointment as a party. How much this was due to unrealistic expectations we can't measure but it was obvious you were gutted and angry. Much more importantly, you were wanting us to put things right and get on with rebuilding to fight again.

Believe it or not there were some positives. These will be covered in the report. Indeed, at a local level many parties reported that they had built new teams, increased levels of support and chatted to more people than ever before. In fact the optimism of many candidates, despite their criticism of the national campaign, makes the panel feel that there is real hope for the future.

But nothing can hide the fact that we ended with only 11 MP's and our leader lost her seat.

The emphasis in our report has been to get to the bottom of all the questions you asked in your submissions and we believe we have done that. The focus of this formal feedback is not just what went wrong but is on why it went wrong and what can we do better in the future.

Our recommendations fall into different categories, including things that should have already been in place and happening as part of a healthy functioning organisation but weren't, to things that could be done with political will, determination and some cash, but are fairly straightforward and largely uncontroversial. There will also be recommendations that will be painful and challenging and will upset some people.

Some might say the most important – possibly the only – job of the leader is to lead the party politically; creating our liberal vision and communicating it beyond the echo chamber of our Conference. The Review Panel and I would wholeheartedly agree; we must reconnect with the electorate as a whole. We must give a fresh distinctive vision of a liberal Britain in the 21st century with policies that resonate with – and are relevant to – ordinary people.

We need to repair the rift that has occurred over several years that has led many of our activists to feel things are 'done to us' by a central HQ that doesn't know what it's doing and has sidelined skilled and experienced local teams. Restoring the balance of local autonomy versus national support is essential.

Rigorous debate about this will itself bring about a better understanding of playing to everyone's strengths as a collaborative partnership. It is not one or the other – Central vs Activist or Local vs National – it is all of us together; we all have a part to play in this and there are faults on all sides.

Our governance structures are a mess and don't do what they are supposed to! Our legitimate desire to be democratic at all levels sometimes has unintended consequences and masquerades as 'democracy', when in reality accountability is unclear and decision-making obscure.

Lastly, our staff work hard and are extremely committed. We have no doubt about that. But the culture, structures and processes at HQ need serious changes. These will be far reaching and deep rooted. The necessary repairs and improvements will take time. We need to allow our new CEO to lead these changes and get on with it; with accountability, but not interference!

This is why our recommendations have strongly emphasised re-working the three equally important roles of leader, president and CEO, which we believe have been out of kilter for several years, thus contributing to the dysfunctional nature of the organisation.

Perhaps inevitability in this culture, we have seen the emergence of a 'fire-fighting', hands on president, usefully filling management black holes but thus blurring lines of responsibility and modes or operation of the roles of CEO and president; necessary in extremis but not desirable.

It is also apparent that there are bridges to build; some local parties were left feeling hurt and damaged by individual issues that happened to them. Swathes of seats, around the country that were not on the 'infamous' target seat list felt justifiably abandoned and neglected. Healing these wounds has to be the top priority of all of us in different ways. Our members are our party and how we treat them matters.

I have been round long enough to know that any Liberal Democrat election review receives more criticism than praise, followed by complaints that it hasn't been acted on. As a panel we are committed to changing that, and as a result have made specific recommendations for the implementation process.

If it is at least recognised that this one hits the key issues, starts the process of making much needed changes in the party and points the way to success in the future then the time spent by the diligent and deeply committed panel will not have been in vain.

The story of 2019

A disastrous General Election year, many years in the making
To say that the outcome of the general election on 11 December 2019 was a bitter disappointment for the Liberal Democrats is a big understatement. We emerged with one seat fewer than we had achieved in 2017, the party leader Jo Swinson lost her seat and even the 4.2% increase in our vote share still left us at a level that is low by historical standards.

Throughout 2019 – not least because of fantastic local and European election results – there was a growing hope that we had an opportunity to make a significant breakthrough in this election and achieve a result that would enable us to stop Britain leaving the European Union. Those hopes were dashed, and we are right to be disappointed.

However, it would be wrong to conclude that this is simply a story of the Revoke policy, a prime ministerial campaign, over-optimistic targeting and one-track messaging. The real story runs much deeper and over a much longer period of time.

If electoral good fortune is about preparation meeting with opportunity, then the Liberal Democrats story in 2019 is one of a real opportunity, but for which we were fundamentally unprepared.

The overarching conclusion of the review is that had we made much better decisions in 2019 we might have gained a few more seats, but not many more.

This review will cover those decisions, but the deeper challenges we faced as a political party and as an organisation at the start of 2019 were many, significant, structural and long term; correspondingly, so are the recommendations of this review.

Many changes will be difficult and will take time; there is not a moment to lose, we must start now.

1 January 2019, a far from Happy New Year
At the start of 2019 the Liberal Democrats' fortunes were not looking good. Our national poll ratings were sluggishly sitting in single digit figures, Brexit was coming up on 31 March and years in the electoral doldrums were taking their toll.

The defeats in 2015 and coming out of coalition were recent history, but many of our challenges began before that. While we achieved the hard-fought goal of political power in 2010 we lost five seats compared to the previous general election. Indeed, in the five general elections between 1992 and 2010, we achieved an average vote share of 19.6% but the last three general election campaigns resulted in an average vote share of just 9%. National elections in Scotland and Wales have been equally disappointing.

The general election plan, which was being written in 2019 for a likely election in 2022, was a sorry picture of how political reality had taken its toll on the party machine. It was being planned on a shoestring budget, with a list of 32 target seats, which many people considered optimistic.

Many of the challenges faced were well documented in the reviews of 2017 and 2015, and were still to

be implemented. The three key themes from those reviews were:

i) A clarity of vision and purpose that had relevance with the UK electorate – including BAME communities as well as other minority groups whose freedom, dignity and well-being we champion – that the whole organisation could get behind and work towards.

ii) A clear understanding of the roles of leaders, teams, and party bodies working together in a cohesive culture.

iii) Reforming how we conducted elections, including investment in training as a route to reinvigorating local activism and development of exciting policy and message platforms.

The snap-election of 2017 had severely disrupted implantation of these changes and the level of staff 'churn' had been significant; several rounds of restructures and redundancies took place in challenging financial conditions.

While there was a skeleton general election plan, it was by no means complete, not least because the operational and working relationships in party HQ were far from good. Leadership had been a merry-go-round of changing leaders and CEOs (Clegg, Farron, Cable, Gordon, Harvey). Teams were working in isolation and there was little collaboration in planning how we would deploy our resources against what should have been a core capability; preparing for and managing elections.

The relationship between the leader's office and HQ was fractured. Morale was at rock bottom.

Then, as it so often does, the political landscape shifted; things started to change; but as they did so this underlying lack of preparation and structure was still lurking; it was the ghost that would return to haunt us.

The light at the end of the tunnel

With the 31 March Brexit deadline approaching, the reality of Brexit started to take its toll on the government; unable to get her deal through either her party or Parliament, Prime Minister Theresa May requested an extension to the Brexit deadline from Brussels.

The resulting turmoil in Parliament and the views of the electorate was nothing short of seismic, as the two-sides of the Brexit debate started to shape the political landscape.

The newly created Brexit Party drew support from those in favour of an exit from the European Union ('respecting the will of the people') and the Liberal Democrats from those who either wanted to Remain in Europe, or who wanted a second referendum (confirming the will of the people).

The Liberal Democrats polling was transformed as, having supported a People's Vote from 2016, we capitalised on that long-standing platform, bringing in new supporters. The results in the May local and European elections – the latter of which had not even been on the agenda a few months before – were exceptional.

Local and European elections
In the local elections on 2 May we made over 700 net gains, more than at any single set of local elections in the party's history. Three weeks later in the European elections on 23 May, we won 16 MEPs – our highest ever number –trouncing both the Conservatives and Labour who had written us off as a spent force.

These elections provided an insight into the unique coalitions of belief and frustration that can collide when the national government is not up for election. Our support was far from a united group. There were those who wanted to Remain at any cost, and those who wanted to Remain but who thought some form of referendum was a more democratic way to achieve that. There were also those who might have supported a deal but who either realised that 'No Deal' was a possibility or who believed that 'Any Deal' needed the electorate's final blessing.

These nuances in the make-up of our support were under-appreciated and when we later came to adopt a stronger Remain position it fragmented.

This was predictable – it often happens when the 'protest vote' potential of other elections is put into the partisan cauldron of a first-past-the-post general election – but was overlooked. Membership was growing to record levels as confidence inside and outside the party was reinvigorated

Meanwhile, within the Liberal Democrat machine...
As the party's fortunes and polling was on an upward trend, so was internal morale as teams experienced the momentum that comes from winning.

Elections however do not come without a cost. They are full-time and full-on, requiring the full suite of blood, sweat and tears from staff, candidates and volunteers. While the fundraising team were finding it easier to bring in vital donations and provide much-needed 'economic lubrication', the people in HQ were running on adrenaline and were in need of recuperation.

'Recuperation' however was a rare commodity anywhere in 2019, particularly as the Liberal Democrats embarked on two rounds of internal elections; for a new party leader, and then for roles within the Federal Party including the president.

With staffing levels still low following previous redundancies or hiring freezes, it was all hands to the deck to elect the new leader and leadership bodies. Meanwhile vital plans to prepare for an election were gathering dust.

A summer of optimism
In June – as the leadership contest between Jo Swinson and Ed Davey was under way – the party received a round of MRP polling. This was the result of a generous donation and provided a valuable 'snapshot' of current opinion nationwide. It also gave a seat by seat prediction of electoral success at that moment in time; one that was unique and contentious, but which was to later become the start of ambitiously revised targeting plans.

The results were like all our Christmases come at once; it put us ahead in 73 seats and within a five percent swing of a further 219 seats. These results were ground-breaking, but while a great boost for

confidence and momentum, they also raised eyebrows. Many of the seats highlighted as new opportunities did not look like Lib Dem seats. Where was the strong local government base and local campaigning capacity? Where was the evidence of continuous canvassing activity over a period of years? Where were the recognised local champion candidates? Was is really likely that the Brexit Party would hold ground against the Tories in a way that UKIP never had?

As a result of those questions, a plan was created to put some realism into how the polling was to be used; seats were split into the top 40 primary targets, a batch of 40 secondary target seats, and a further 140 seats identified as potential opportunities if the landscape really did transform.
The existing plans – the ones gathering dust – had identified 32 potential seats, which were already presenting a challenge to properly resource. As that rose to 40, and then 80, concerns were being voiced by senior and experienced campaigning staff and politicians that the party was simply not ready to fight so many seats. In most seats the most precious commodity is time (in years) because that is what it takes to get the candidate and teams in place and the doors knocked on. If an election was pending, how could we possibly be ready in time?

That was the discussion which was underway when the Liberal Democrat's summer got a further dose of optimism; they elected a new leader.

Jo
Leadership elections nearly always provide a boost for a political party and Jo's election was only different in that it took place on an already rising tide of optimism.

In her acceptance speech, Jo championed her ambition for the party and her role as the Liberal Democrat's candidate for prime minister. At that time, it was little more than a nod to her official role, as many party leaders had done before her.

Jo embodied the confidence being felt inside and outside that party and took it to another level. If Corbyn and Johnson were so extreme and disliked in their different ways; why should our dynamic new female leader, young, able and living in the 'real' world, not be a credible alternative?

Research was commissioned to understand how Jo would appeal as a leader to different parts of the electorate and the results were positive; she appealed as a contrast to the 'repellent twosome' of Johnson and Corbyn.

Throughout the summer, Jo and key senior Lib Dems spent much time working with disaffected Remainers from other parties to encourage them to join us. This was successful, with seven MPs (three Labour, four Conservative) coming over to us; every defection was another boost to confidence in the party's prospects.

It is against this swell of electoral success, defections and new leadership that a giant wave of optimism washed through the leadership team and senior staff which lasted all the way to polling day on 12 December.

Many felt this was going to be 'our time.' Even the most hardened campaigners found themselves seeing a pathway to a major electoral breakthrough and an opportunity to Stop Brexit; it was an optimism that was to maintain itself even when the evidence started to turn against it.

It was against this backdrop of enthusiasm that Jo set to work to plot a course which could capitalise on our swelling support at a general election – now likely to come sooner than the 2022 election previously envisaged – and prepare for the party's Autumn Conference.

Behind the scenes
As soon as she became leader Jo had serious concerns about how best to handle the effectiveness of the party's headquarters at Great George Street. Some of these concerns were accurate and understandable – it was clear to many that things were far from ideal – and some were the concerns that any leader would have about coming into an organisation as a newly elected figurehead.

Wanting to have confidence in the information she was being given, and with a level of scepticism about the quality of input from staff, Jo set to work on the areas she was most concerned about; when would be the right time for an election and what were the messages and manifesto we would put to the people.

Jo's election also set in motion the recruitment of a new CEO to replace Nick Harvey – a process which would ultimately see him leave before the election campaign – and created around her a group of people whom she trusted. This had the unintended consequence creating an 'inner circle' of advisors at arm's length from the resources of the party machine, and put decision making in the hands of an unaccountable group around the leader. It also severed some people from the roles and responsibilities they were employed to do, and led to the over-promotion of others. When it later came to scaling up for the election, members of this inner team of advisors were given very broad remits. This proved unmanageable and removed the necessary debate and challenge, which are vital for driving improvement.

Jo also wanted to understand the reality of the MRP polling and asked for work to be done to show what the path would look like that could really deliver such a ground-breaking result. This was initially an exercise in due diligence – to sense-check what looked to be surprising results – but in the end became the default targeting scenario. The reality of how well prepared we were as an organisation for fighting the election was less well explored and those voicing concerns were left with the challenge of how to address them.

When, a few short weeks later, the need for a full and proper election plan would be needed it was these conclusions that the team would come back to. Not to plans which had been developed, monitored and managed over a period of years, but to the needs of a new leader developing her team and her stance on messaging, manifesto and ambition.

As this work was going on – developed at the height of optimism and unconnected from the reality of what the party could achieve on the ground – in 'the real world' the turbulence of Brexit continued unabated. With Parliament in the heat of battle, our confidence in being able to challenge Brexit, the Conservatives and the Labour Party continued to rise and – with a fresh parliamentary by-election victory – the party prepared for the annual conference in Bournemouth.

Brecon and Radnorshire, the warning light that was missed
At the height of defections, optimism and strong polling came the Brecon and Radnorshire by-election on 1 August, where the party threw absolutely everything at the seat with hundreds of activists travelling to mid-Wales to campaign.

The party secured a deal with both Plaid Cymru and the Green Party, where they both agreed to stand down in our favour; a pilot for what would happen later at the general election.

Yet, while the by-election produced a victorious outcome with Jane Dodds gaining the seat from the Conservatives, there were warning signs which should have flagged concerns.

In the MRP polling – on which we had based much of our planning – the Brexit Party were predicted to win Brecon & Radnorshire with 32% of the vote (Lib Dems 27%, Conservative 21%). The reality was starkly different. For our new ambitions to be realistic the Brexit Party needed to hold ground against the Conservatives in seats like Brecon. They achieved just 10.5% of the vote.

The level of activity that it took to win Brecon & Radnorshire was huge. The level of investment – especially in people on the ground, which depleted the HQ field resources for the duration of the campaign – was exceptional and there is a strong local party (it is the only Lib Dem-held seat in the Welsh Senedd). However, even with all the resources that come with supporting a by-election the majority we gained was small.

The warning light was missed; or at worst ignored. We had another MP to add to the growing number who were gathering by the sea in September.

Conference, the vote beside the seaside
The optimism in Bournemouth was palpable as hundreds of new members, a new leader, new defectors and a new MP gathered in the belief they were embracing a new political reality.

It was Jo's first chance since her acceptance speech to set the tone with the party faithful as well as leverage the news and media coverage which comes with conference season.

However, there was potential for major disruption. Over the years since the EU Referendum in 2016, motions had been put to conference in various guises for the party to adopt a stronger position on Brexit, namely that we should have a policy to revoke Article 50.

This had previously seemed a relatively extreme policy, but in the light of a potential 'No Deal' Brexit, and six million signatures on a Revoke petition, it was gaining traction amongst members and was going to be presented at conference. Not wanting a 'showdown' with the party faithful, the leader's team opted to support a motion that in the unlikely event of a majority Lib Dem government we would revoke Article 50, taking the electoral victory as a mandate. The vote was comfortably carried.

However, this was only one part of the conference story. Another was Jo and her leader's speech. It was a good moment, expressing confidence and belief in the possibilities for the party. Jo mentioned again being a candidate for prime minister; as a message for the party faithful it is always a crowd pleaser. Outside of political geeks and party members, those messages went largely unnoticed.

After conference the polls rose yet again, and this was taken internally to be an endorsement of the messages presented. That assumption had not really been proven; in general people aren't very interested in politics and see less of the Liberal Democrats than other parties. When our conferences get coverage – and in recent times they have received less – we usually get a post-conference bounce,

but this is more likely to be because the party gets some valuable airtime and people are reminded that we exist. It might feel nice to think that the electorate at large heard about our specific policy and leader's message, but it is probably wishful thinking.

That wishful thinking came to shape the future, as with the Revoke vote, Jo's ambitious speech, and the supposed polling 'bounce' were sown the seeds that would grow into our key election messages. When the team were later hunting for their campaign messages it was here they came back to – Stop Brexit and Your Candidate for Prime Minister – messages designed for a conference attended by Liberal Democrat party members rather than the general public. When the electorate focused on them for the first time, in the election campaign, they went down badly.

Post-conference, the polling tide starts to turn again
After the post-conference bounce, the landscape started to change, and with it our polling. There were two major changes which we failed to appreciate or react to.

The first was that the Labour position changed – to favour a referendum on any Brexit deal. Much has been made of the nuances of the policy, and the impracticalities of how it would work. However, just as the complexities in our Revoke position were missed, so too were those in Labour's. They became more 'Remainy' and we didn't appreciate by how much. When the electorate focused on it for the first time, in the election campaign, it went down well.

The second key change was that Boris Johnson secured a deal. From that point onwards the polls started turning in two ways; The Liberal Democrats started losing ground and the Brexit Party plummeted. Until that point a new referendum – maybe even Revoke – had looked like the path of least resistance away from Brexit, or a No Deal crash-out. However the path of least resistance then became The Deal.

At this stage, there was no confirmed election message as such – Stop Brexit, Build a Brighter Future came later – but if there was a time to change tack on Revoke this would have been the moment, before the microscope of an election was upon us and before the Brexit Party had stood down. Such a change of tack would have gone against the recent Conference vote, and doubtless have created turmoil, but any change would also have required a level of planning and preparation which simply had not happened.

Meanwhile, in Westminster…
The turmoil at Westminster – as Parliament was first prorogued, and then not – was unprecedented.

Boris Johnson's government had unexpectedly managed to negotiate a withdrawal agreement with the EU that the Conservative party was able to unite in supporting and which some Labour MPs were willing to vote for.

This followed a long period of parliamentary stalemate in which it had appeared impossible to reach an agreement with the EU that would be approved by the House of Commons.

The withdrawal agreement bill had passed its second reading. Although the government had lost the crucial programme motion and had not obtained the necessary financial resolutions – so that there

remained the possibility it might be amended or fail to pass third reading – the belief among the Liberal Democrat leadership team was that it would pass in some form before 31 January with Labour support.

In that scenario our European raison d'être would be lost, and with it the electoral wind in our sails. Part of the work which Jo's team had conducted over the summer was a wide ranging exercise to look at scenarios of electoral potential at different levels of Brexit progress; there was unanimous agreement that an election 'post-Brexit' was considered to be disaster.

With that context and having consulted among themselves – and with the notable absence of consultation among other parts of the Liberal Democrats, who could have shed some light on how ill-prepared we were on the ground – the Parliamentary Party voted to support the government's request for a general election, a decision, we believe, founded on a genuine belief that this was the only way to stop Brexit.

No doubt the rights and wrongs of this will be debated long into the future; a debate which exemplifies the lack of strategy and clarity in decision making which characterised the Liberal Democrat's general election campaign in 2019.

On the big strategic choice we made no decision.
While much preparation was needed even before 2019 started, there were crucial errors made throughout 2019 which made a bad situation worse.

The first is a lack of overall strategy and scenario planning for the specific electoral reality of 2019.

The leadership was faced with two Catch-22 strategy options; and as became one of the hallmarks of the campaign, no decision was actually made.

One was to embark on a pure strategy to Stop Brexit. Under this strategy the plan would have been to ensure as many pro-remain MPs in the House of Commons as possible. This would have necessitated standing down in areas where there were Labour pro-Remain MPs. The consequence of that decision could likely have been a collapse in Conservative tactical voters petrified of a Corbyn led coalition. While we said we wanted to Stop Brexit we were not prepared to take that strategic risk, nor did we make any preparations for how we could mitigate that risk.

The second was a pure strategy to maximise Liberal Democrat representation in Westminster. Under this strategy the plan would have been to let the Parliamentary stalemate continue to play out. The consequences of that would have been Brexit happening, either with Labour votes or with No Deal; this in turn might have given us a way to profit from either Labour or Conservative disarray in an election. While we said we wanted to maximise Lib Dem seats in Westminster we were not prepared to take that strategic risk, nor did we make any preparations for how we could mitigate that risk.

In the end we did not clarify or decide between these two hellish scenarios, and we will never know what the alternative reality might have been. Instead we chose to claim to believe we could win outright ourselves, thus obviating the need to choose.

It is this lack of clarity which led to an election campaign that can only be described as a high stakes

gamble for a once in a lifetime election, to stop Brexit by winning outright. It was a gamble which did not pay off!

The election: a high speed car crash.
As the likely election was finally confirmed the reality of how hard the turbulence of 2019 had disrupted preparations for an election was suddenly clear.

Beyond 'Stopping Brexit' our other policies and messages struggled to cut through. If you read the manifesto and our speeches, there was much to admire – including having the most fiscally credible policies on the economy – but they didn't add up to anything cohesive. There was no overarching offer of the country we wanted to create that would appeal to the electorate at large.

Indeed, we alienated large chunks of the population; on Brexit; the electorate was divided into three groups: 20-25% passionate Remainers, 20-25% passionate leavers, and 50-60% who weren't really that passionate either way. As a Liberal party we could never have gained votes from the 20-25% pro-leave group but we did effectively ignore the biggest group. It contained people who had voted remain and people who had voted leave but to whom we could have offered something else because Brexit wasn't the main issue or even one on which they had clear views.

This was compounded by errors in how we addressed support amongst BAME communities, especially in London, which was vital to our plans in 2019. We achieved 12% of the national BAME vote, in line with our national average. However the Labour Party – which won 32% of the overall vote – won 64% of the BAME vote compared to 29% of white voters. (The Conservatives won 29% of the BAME vote, 48% of white voters). In London, where Labour retained the same number of seats, this failure to address the BAME vote was an added barrier in already challenging target seats; for example in Cities of London and Westminster we lost by 4.63% – the local BAME population is 38.4%.

Decision making in the election was unclear. Those who were supposed to be leading 'on paper' were often not leading 'in person' because decision making was being taken elsewhere; often in the leader's team and sometimes by Jo herself. This not only slowed things down but concentrated decision making in a small group whose belief in the leader and the mission was so strong that challenge was at best ignored and at worst actively discouraged. It also hindered a culture of working together in a spirit of collaboration.

The ground war
The targeting for the ground war set us up for a huge campaigning effort for which we simply had not built the foundations over time. Those who had previously dared to challenge the new seat targeting as too optimistic or unrealistic were proved right.

An admirable plan for putting much needed field resources in place was implemented; this had been swiftly planned earlier in the year in response to the challenge of targeting many new seats. It was successful, but it could not and did not replace the much-needed training and deployment of field resources which seats require in between elections.

East Dunbartonshire, Jo's seat, is sadly a good example of where much needed ground support could have made a vital difference. It has always been a marginal seat, which was lost to the SNP in 2015 and

regained two years later when the Lib Dems benefitted from the pro-unionist vote. It was the perfect example of a held seat which needed sustained local support from the day it was won back. Regrettably however those local resources were not in place. A more united local team, with more bodies canvassing earlier and during the campaign in support of their candidate might have saved it. Nick Clegg nearly lost his seat as leader, Tim Farron nearly lost his. Jo sadly paid the price from lessons not being learned that the Lib Dem leader's seat is precarious.

Because we were dealing with many seats that did not have the local resources and campaign teams in place, we put in place heavyweight direct mail campaigns. If we couldn't knock on doors then we would land on doormats. While some lower tier seats appreciated the support there was a lack of dialogue and coordination between local and national teams, which caused much antagonism. The quantity of leaflets, high volume of target seats, resource limitations, lead times and logistics challenges meant it was impossible to control what went through a particular door on a particular day. Many teams suffered from 'five leaflets at once' and ALDC – who had provided much valuable support – experienced a particularly significant delivery problem with Freeposts via an external organisation that struggled with the scale required.

It is true that the seats we performed best in were the seats that got most leaflets; but it is also true that we sent more leaflets to the seats we were going to perform better in. Many of those seats were ones which had a strong local campaigning presence. Local campaigns spoke of the frustration when constituents were receiving both specific locally nuanced messages as well as generic national messages which often contradicted each other. If the quantity was questionable, the quality and coordination were poor; The national direct mail operation was of unprecedented scale, but with insufficient time and capacity. The extended lead times for sign-off – often reaching right to the top – combined with resource constraints made it impossible to tailor output to local campaigns or to respond effectively to feedback.

Canvass data was not used effectively at national level to monitor the impact of messages, nor to assess progress and redirect support to critical contests. A large proportion of the 'new' target seats had little or no historic constituency-wide data and, with low capacity and shortage of time, focused largely on GOTV – speaking to the most likely supporters. This also meant that in some seats we were canvassing without talking to BAME voters who constituted a large proportion of the Labour votes, particularly in London. It was recognised that such data could not be the basis of making strategic message and resources decisions, but that in turn led to vital feedback from seats with good data and local analysis also being discounted. There was insufficient bandwidth at HQ to resolve this, so important choices were made largely in the absence of local campaign input.

Winning seats tell a different story; one of a constituency-wide canvass data base, regularly updated, collected from thousands of doors knocked on over many years, in the hands of experienced local teams who were getting the right messages to the right people.

While we had candidates approved and in seats everywhere – a positive – we depleted senior resources on an exhausting, stressful and ultimately unproductive process for handling defectors and Unite-to-Remain seats. In some seats campaigners spoke of being left 'in limbo' waiting for decisions, others suffered some embarrassing moments when candidates' social media history caught up with them and others felt the treatment they received was threatening or forceful. Many seats are still hurt from the experience and bridges will have to be rebuilt.

The air war

The manifesto, while receiving praise from many quarters (IFS, the Resolution Foundation, *The Economist*) had been subject to re-working through the year and arrived late as a result. There is also a fundamental difference between what people understand as the manifesto ('what they stand for') and what we mean by our manifesto (a detailed set of policies). Despite the real promise in the detail, the perception overall was that we didn't offer anything that might appeal to those who had voted for Brexit and that Jo wanted to become prime minister.

Our lead messages were put together hastily. Jo had decided to depart from the well tested 'Demand Better' platform, but no new messages had been developed and subjected to the same rigour of research. This included a lack of testing for resonance and relevance in 'real life' scenarios – for example focus groups – among different audiences and communities.

We have fallen behind the Labour and Conservative party in our use of creativity in messaging; messaging was blunt in tone, lacked the visual impact of our opponents and we departed unnecessarily from our existing brand guidelines at the start of the election which local parties had previously been adopting.

We suffered from self-inflicted attacks as the complexities of our 'Revoke' policy were twisted and used against us; by the Conservatives to mean 'undemocratic; they want to ignore your vote in the referendum' and by Labour (as well as the nationalists and other parties) to mean 'undemocratic; they won't even give you a second vote'. We failed to pick up many of the anticipated Tory remain voters, and we made significant losses to Labour. The Labour Party also successfully turned our decision to vote for an election into a message that we were 'supporting the Tories' and a weapon to amplify their criticisms about our time in coalition. Our failure to address Labour voters cost us dearly as 84% of Labour's 2017 Remain voters stayed with Labour.

'Your Candidate for Prime Minister' had gone down well at conference, to members, and as an ambitious reflection of polling from earlier in the year. It appeared unrealistic to the wider public, especially given that we were already falling in the polls. It also made it harder for us to leverage other high profile candidates, particularly some of the new MPs. Admittedly, they lack the same media 'pull' as the leader but focusing so heavily on Jo exacerbated the problem.

Many submissions spoke about 'faces on buses.' In reality not many people see the bus itself but it demonstrates the crucial difference between being the leader of the Liberal Democrats – and therefore the lead 'message carrier' – and the choice to use your leader as the message to be carried.

Neither message was tested in real life scenarios with people 'on the doorstep' or face-to-face until the election. They both went down well at conference and we assumed that the polling bounce afterwards was evidence of support. Both fell apart once under the predictably intense media scrutiny of an election and we had no time to properly develop our responses to the challenges against us; indeed our 'if-this-then-that' responses about sounded complicated. The maxim of 'if you're explaining, you're losing' is appropriate.

Previously net-positive ratings for Jo fell during the campaign. There was clearly a lot of misogyny and sexism at play, and Jo's appeal to women also fell significantly during the election.

For any leader to be successful takes time; to build awareness, to form relationships, to understand the role and learn from early mistakes. However for Jo that time simply did not exist and – while sex is of course no barrier to being able to do the job successfully – there is a growing body of research on the challenges of being a female political leader which imply that time for preparation is even more valuable. Time not just for themselves and their party, but also for people to 'get' someone different from the 'norm.'

The Consequences

It takes time to build up a perception of what a political party or 'brand' stands for; many areas of our messages contradicted what people had learnt about the Liberal Democrats over time. The Liberal Democrats had built, over many years, a perception of 'Fairness' and of being 'Local Champions.' Campaigning for a second referendum would have struck more people (though not everyone) as fairer than 'Stopping Brexit' and the presidential style 'Jo4PM' campaign contradicted our legacy of campaigning on local issues with a local champion.

Those perceptions are built on more than just a message or a personality – everything communicates something – and the assorted parts of the campaign were fragmented and poorly coordinated. All the expected elements were there – the speeches, the leader's tour, events, social media, party political broadcasts, a manifesto, the interviews – but they lacked cohesion; there were some good solo moments perhaps, but there was not an orchestra.

Our place in the media, always a challenge, was particularly painful. Some elements beyond our control we seemed to handle reasonably well, notably over the TV debates where our legal challenges enabled us to capitalise on what was always going to be a losing battle. However, we were unprepared for the elements that should have been in our control. Part of the team whose job was to plan attack and rebuttal messages had been drafted in to finalise the manifesto, and so we did not appreciate how the media would interrogate our position on Brexit, or how our messages would be twisted by the opposition and used against us. We also suffered from – or were unprepared for – the inevitable questions about our role in the coalition government and the inherent risks of focusing on marginal issues, which are important to some, at the expense of everyday issues, which are important to many.

There is a myth that the Liberal Democrats always suffer from 'squeeze' during an election. Historically, we have often enjoyed increased support in general election campaigns as a result of extra coverage (1979, 1997, 2005). However we do suffer squeeze more when either side of the opposition is polarising, and so in 2019 the squeeze was predictably extreme; the level of fear and dislike of each of the main parties for the other cemented their support and our drive to get people to vote tactically did not work, even with the drum-beat of the online noise from tactical-voting websites.

In any modern and well-functioning organisation it is vital that information and decision making flow easily – the 'feedback loop' – but where these feedback-loops should have existed there were often dead ends. This was partly because we adopted a bunker mentality, sticking rigidly to a single course of action despite overwhelming evidence to the contrary. However it was also because systems and processes were inadequate and because our hard lines, new targets and ways of working were particularly difficult to adjust mid-flight.

There were some changes made through the campaign – the 'candidate for PM' line was – after much time had been wasted – dropped, 'Stop Boris' was emphasised as a message over 'Stop Brexit', the number of seats we were targeting reduced – but those changes were either late, invisible or ineffective.

Nobody intended it to be how it was, but the outcome was catastrophic. We were poor performers in an election which we helped to call, and in which poor planning, leadership and decision making compounded to give us such a poor result.

Disastrous as it was, however, it is the making not only of poor decisions in 2019, but the failure over many years to reform, properly plan and run our organisation with a culture focused on electoral success.

The lessons were there before, with all their extenuating circumstances, and they are here now without them.

What we choose to do with those lessons is now a challenge firmly within our own grasp.

The Positives

While Brexit is sadly a reality, and the government holds a majority that risks running unchecked, the situation in which we find ourselves is not without any merit. We must learn more from our mistakes but there are silver linings in this crisis that hold valuable lessons.

The gift of time
The time for preparation, which we lacked in the volatility of two snap elections, is something we do now have. We met with opportunity in 2019 that we were not prepared for, many of those preparations would have taken years to put in place. We must use the years we now have wisely to understand the needs of the country and forge a new vision based on that understanding.

New leadership
We have a newly elected president, a new CEO, and in due course we will elect a new leader. It is clear that how those roles operate needs to change, and it can now do so unencumbered by the baggage of legacy.

New opportunities
By virtue of circumstance, targeting, funding, passion and enthusiasm we are now in first or second place in 102 seats, compared to 50 in 2017. This is a strong base from which to grow.
While we must of course learn the lessons of overoptimistic targeting, many seats mentioned significant growth in activity, activists and talent, which can be leveraged both nationally and locally in the coming years.

This also applies to many seats which were not target seats, but where candidates stood – often out of sheer bloody-mindedness and loyalty – showing the potential even in hardest areas; there is always campaigning that can be done, seeds that can be sown.

Dignity
While the results for new MPs who joined us in 2019 was universally disappointing, there is much to admire in the stories of local parties and candidates that came to rally round them, and indeed in the individuals themselves. While there are elements of this election which showed us at our worst, there are also stories which showed Liberal Democrats at their optimistic and pragmatic best.

Fundraising
The success of the central fundraising campaign in 2019 – having had significant challenges in the previous years – was significant and professionally conducted. While there were challenges about how early we could spend donations, the reason we could take on such ambition, and the reason we exited 2019 in better financial health than in previous elections is down to the success of this team.

While it is necessary to highlight that funds were donated in vain – and that earlier funding would have made an even bigger difference – we did increase our vote share more than we had in any previous General Election in our history, and there are new relationships being nurtured for the future. The fundraising team raised the party's capacity dramatically and will remain a vital part of the preparations for the future.

Scotland

Scotland now has four of the eleven Lib Dem MPs, the party manifesto took sufficient account of Scottish political needs and the vote share rose across the country with many deposits saved, and the NE Fife campaign was successful.

Proportion of female MPs

Of the main parties the Liberal Democrats will have the highest proportion of female MPs at 64%, most of whom were elected with strong majorities. While we have only 11 MPs, that balance is a benchmark we should strive to maintain as we seek to gain more.

Crisis communications

Paradoxically, crisis communications was one of the more successful elements of the campaign. One volunteer, often working 16 hour days, ably supported by three others dealt with a multitude of queries covering many issues arising from candidates (often where due diligence had failed to uncover pre-existing issues) and members (often social media); organising legal responses, signing off press office responses, dealing with errors in communications or approvals with third-parties, and generally helping to avoid or respond to threats. This contained the negativity and workload to a small team, thus freeing up others to get on with their jobs knowing this essential but challenging area was covered.

Field teams

With time against us, and resources in seats lacking, the Field team developed the National Field Organiser programme, putting in place a team of 80 staff to support campaigning and build voter contacts in key target seats. This was a significant task, including the right compliance support. It is one of the reasons we performed well in seats which were previously 'off radar' and should be 'banked' as part of our future armoury, though to be deployed at the right time and with the right preparation.

The manifesto

Our full manifesto received many plaudits; the IFS deemed it the most economically credible, we won the support of *The Economist*, and the Resolution Foundation highlighted it as the most likely to support those in most need. While this further highlights the importance of having an overarching vision to tie the manifesto commitments together, we should aim for those benchmarks again in the future.

MRP Polling

The MRP polling commissioned was a great way of understanding the potential for the Party in seats nationwide, highlighting new opportunities and giving an understanding of the landscape. As a base for planning and targeting the 'snapshot in time' needed better balancing with local knowledge, experience and the realism of longer term 'read' but as a tool MRP is a valuable addition to our knowledge bank.

Social media advertising

Compared with the resources available to other parties, we have put in place a digital advertising 'machine' that enabled us to reach millions of the people we planned to contact, notably on Facebook, with multiple variants of messages. What let the advertising part of 'digital' down was the underinvestment in creativity and production and the overall campaign targeting decisions.

Best practice

There are numerous examples of 'how it should be done' from seats nationwide. As we start developing plans for the future we must include how to enable all to learn from these. They range from Westmoreland and Lonsdale where we have consistently held our seat with a 'Leave' voting electorate,

through great examples of numerous PPCs acting as genuine local leaders, all the way to Castle Point (76.7% Conservative) where the appointed candidate left behind them a glimmer of hope; the first saved deposit since 2010 and a small but passionate group of activists now plotting to win their first ever ward.

There are many more stories and the party needs to find the ways to [use digital to] codify and scale them; to act as a facilitator of learning.

Conclusions

A disaster waiting to happen
While decisions made in 2019 certainly frustrated our electoral prospects, the underlying lack of preparation is a bigger cause for concern. There was an opportunity for us to win more seats in 2019 but the main causes of that failure are the decisions made over the course of many years, before Brexit was even conceived.

A lack of a long-term vision and strategy
Even beyond the chaos and uncertainty which came into play in 2019, the Liberal Democrats had not translated their beliefs into a clear and relevant vision or the strategy to put it into place, and whose structures and processes led to a culture which lacked cohesion.

A strategy should set the long-term direction – at least the duration of a parliament – aligning resources to a clear vision. Strategy by that definition was fundamentally lacking.

There is a crucial and important difference between a Liberal Democrat member and a general member of the UK electorate. There are thousands of the former and millions of the latter. We enjoy debate and discussion and are rightly proud of what we stand for; but we have become very good at talking to ourselves about the things we like to talk about. This has come at the expense of constantly thinking about what 'normal' people care about and building everything we do around trying to help them. The preamble to the constitution is an inspirational 'beacon' for us but has not been translated into a relevant vision which can be communicated to a broad electorate.

This has also filtered into the party organisation itself. It appears that our functional purpose – winning seats in elections – has too often come second to internal discussion and management; much feedback suggests that resources are being deployed on committees primarily concerned with operational decisions and minutiae and their own purposes and agendas, and that this is true at all levels of the party – national, regional, and local.

That specifically includes planning, messaging and targeting for BAME communities with whom we have to become more representative if we are ever to genuinely challenge Labour. The Alderdice Review which explored the challenges of diversity in the party is another example of recommendations which are still to be implemented and could have improved our fortunes.

In place of a long-term vision guiding a clear purpose for the entire organisation, and a strategy translated into relevant policy and messages the review found an organisation lacking in unity, running a campaign based on time-bound events, using a short-term tactics, bluntly articulated and lacking balance between qualitative and quantitative data to aid decision making.

Cultural, Leadership and Management vacuums
As a result of severe turbulence and turnover in staff, leaders and resources, at the start of 2019 the Liberal Democrats had deep rooted organisational and cultural challenges. There was a lack of clarity in leadership, and overstretched, inadequate or underprepared resources where the voice of evidence or experience was forgotten or side-lined.

Despite core Liberal Democrat beliefs of fostering diversity and encouraging people to contribute fully

to decision making, the review found a culture of decision making in small closed groups, where opposing voices were ignored or criticised.

Partly because of the close ties and relationships that exist within the party, partly because of underinvestment in party staff at all levels and partly because we lack the simple tools and templates to 'onboard' new people, 'someone we know' was often the default over 'someone who can'. At its best that aided our ability to scale up at speed, but at its worst it created an echo-chamber that stifled challenge and progress.

Both formal and informal structures of leadership and decision making were unclear. Those in charge 'on-paper' often lacked authority or power 'in-person'.

There is a lack of both command and control; the governance between the many and various parts of the organisation are in different ways confusing, contradictory or missing and the responsibilities of party leader, party president and chief executive (CEO) are unclear.

The teams or bodies under the leader, president and CEO all suffered from a lack of collaboration with each other and within each other. The leader's office from misgivings about the capacity and capability within HQ. HQ staff from having either fragmented or excessive responsibilities and from breakdowns in relationships and communication. The Federal Board was often a 'rubber-stamp' and is too large a group to be a realistic decision-making body. Local-Regional-National connections are unclear as are those of various committees, and the lack of collaboration and communication was echoed amongst many submissions from Scottish and Welsh teams.

Over years of political and financial turmoil – which are linked – countless areas of the organisation have lost valuable skills and experience. Far from cutting cloth accordingly many people simply struggled on trying to do their best. Not only did electoral results suffer, but many individuals suffered from personal stress, exhaustion and mental ill-health as a consequence.

Electoral failure was a sadly inevitable consequence
As a result of the inherent and long term challenges the party faced – not all of its own making – we ran an over-optimistic campaign that lacked the necessary strategic planning over many years and as a result fell well short of the standards required, both on the ground and in the air, locally and nationally.

There was little or no long term strategic planning for what the total organisation would need to do to be successful in a general election and it was unclear who was in charge and making decisions. It cannot be said any more plainly and it is as bad as it sounds.

Winning Liberal Democrat seats takes years; the local campaigning foundations had not been laid in many places – or had been eroded to the point of being insignificant – and the target seats identified simply did not have the infrastructure necessary to win; precious resources were squandered in trying to win in so many seats.

The hallmarks of potential success are things like strong local council presence, a significant membership base in the constituency, a well organised and disciplined campaigning presence over the duration of a parliament with (ideally local) recognised candidates. Against this traffic light many seats were 'red.' In too many places we ran the red light.
Wales was an unfortunate example of this need for local infrastructure. Having lost all but one of the

party's Members of the Senedd in the 2016 election and with fewer councillors and no MPs following the 2017 snap election, the party had an uphill struggle. With very little semblance of local campaign organisations, very little resource to fight an election, and with no national campaign infrastructure or development programme since 2016, 2019 would have been a struggle even on a good night.

There was a lack of effective communication and coordination between local and national teams; feedback should have been a fast and regular way of getting information but feedback was slow and sporadic, and often went unheeded. There is often a tension on the line between national and local campaigns; too often the line broke.

We researched and communicated messages then replaced them with messaging that was not similarly well researched and, until the election, was not put in front of voters in a way that could properly judge its impact. The impact of what was perceived as a single-issue campaign was negative, and the message launched in such a way that those running the campaign felt it impossible to change course.

Creatively – what our messages look and feel like and how we communicate them – we are way behind the other parties; this is both inexcusable and just incredibly sad given our historic links to the creative industries.

Digitally we suffered from a lack of investment in technology which could have helped us better connect the different parts of the organisation and harness the data that can provide; this is about much much more than 'social media.' It is about looking at all the things we need to do as a party and using technology to make them better. In every area of what we do we could have used digital to improve: training, templates, tools, campaigning, canvassing, communicating, fundraising and more. The online tool to help people identify their 'closest' target seat is a basic but particularly annoying example; many suggestions it made were illogical.

Most of the recommendations which follow are 'time-agnostic' and should not have happened. Indeed, had some lessons been heeded previously they would not have done.

There were of course positives, and in resetting for the future we must keep what is working and leverage it as well as changing what was not. While there is much work to be done, our core philosophy is still an inspiring one and an abundance of submissions spoke of the hope they feel that we may now have reached the bottom; that the only way is up.

Nowhere in the course of the review have we found bad intentions at work. Indeed, much of the frustration we have heard has been because as a party we are united entirely in wanting to be successful and make real the changes we want to see in the world.

As a result there is an understandable sense of a missed opportunity in 2019, and a desire to find fault and consider recriminations. Where changes need to be made we are confident they will be made, but we need to start moving forward collectively. To spend excessive time on our past problems is to risk repeating the mistakes of only looking for answers inside our party when the real answers lie outside with the people in the country who we seek to represent.

There are two final things about 2019 worth remembering as we reflect on the findings of this review.

The first is that it was unique. The second is that it has passed. We must put the 'Brighter Future' of 2019 behind us and move forward together towards a new one.

Recommendation highlights:

In compiling the recommendations, the review panel has kept in mind the long-term success and survival of the party and the vital components for this:

- **A clear vision for the entire organisation, rooted in the lives of the electorate.**

- **A diverse, resilient and respectful culture.**

- **Focusing on training for campaigning excellence.**

There are three areas of recommendations, and the key recommendations are highlighted below. Each of these areas has a series of actions, considerations, timings and an accountable leader which are fully documented in the appendix, along with a recommendation by the Review Chair on implementation and continued oversight.

- **Vision and purpose**

- **Clarity of leadership and decision making**

- **Re-building campaigning excellence**

1. Vision and Purpose:

- Based on the lives of ordinary people in the country today, create an inspiring, over-arching and compelling vision which can guide the entire Liberal Democrats organisation for the duration of a parliament, ideally longer

- Implement the findings of the Alderdice review into party diversity, in full, with urgency.

- Develop a clear strategy which outlines ambitions for electoral success in all types of elections, over the likely parliamentary period and how the entire organisation – national, state, regional, local, volunteer and employed – needs to use its collective resources to achieve that.

- Review ongoing governance of all areas of the party; local, national and regional parties, The Parliamentary Party, HQ Operations, The Federal Party, including the Federal Board, and all connected organisations and committees – and incorporate into the strategic direction.

2. Clarity of leadership and decision making

- Clarify, codify, and communicate the roles and remits of the leader, CEO and president.

- Resource a clear plan to implement the necessary changes to organisational culture, processes, structures and resources in order to deliver the strategy, and our vision.

- Develop policies and practices in line with appropriate modern businesses/other sectors and benchmark ourselves against industry standards where they exist for the relevant departments.

3. Re-building campaigning excellence

- Start now to develop a specific strategy which outlines our ambitions for the next general election and the plan for how we intend to use our collective resources to achieve that, reflecting the need for investment in local parties earlier and over a longer period.

- Identify the criteria by which we can confidently deem ourselves 'ready' to fight a general election.

- Clarifying the criteria for deciding which seats should be targets to win at the next general election, and a plan for communicating those criteria to constituency teams.

- Ensure adequate time and resources are available to build enough and reliable canvas data from which to run a successful election campaign.

- Revise targeting strategy to include BAME electorate, particularly in the most diverse areas.

- Develop specific plans for support needed to hold every held seat, with individual attention to the leader's seat.

- Review and revise procedures for approval of candidates, including how we review their social media history.

- Identify how the dialogue of ideas and active feedback loops throughout the party and organisation will shape the plans and the technology needed to make that happen.

- Ensure every local party and all seats have a pathway to step-by-step improvement and political development – not just target seats – use each GE as an opportunity to leverage campaign activity.

- Identify the key skills and training needed in target seats for agents and candidates, including training for candidates in their role as 'local leader' and support for training on self-sustaining funding, campaigning and voter ID model in support of vigorous year-round campaign activity.

- At national level establish a project to analyse and learn from canvass data collected in target seats over the last three general elections to assist in poll and focus group triangulation.

- Work collaboratively with ALDC to identify the roles and responsibilities for HQ and ALDC in developing/enhancing election-winning skills locally and nationally, while respecting ALDC's distinctive position in the party as a membership organisation.

- Invest in people and pay commensurate salaries for crucial, key roles identified as critical to the effective management of the party and elections.

- Identify best practice in how local organisations are already training brilliantly in the party, and in use of digital technology and peer-to-peer learning systems with a plan for implementing learnings.

- Plan and budget for appropriate remuneration of key staff – specifically fully trained organisers – in identified target seats, to be employed in time for local elections in 2021, and take into account PPCs' individual circumstances when planning what a seat needs to be successful.

- Specify the roles and responsibilities of state parties, regional parties and provide necessary training to develop strong plans in all regions and encourage constituency co-operation.

- Separate the role of the chair of FCEC from the general election campaign lead role. The campaign lead role should be full time for the duration of the election period and remunerated if necessary.

- Develop a straightforward and transparent decision-making process – including management of crises and unknowns – which the chair has authority to manage.

- Unify planning of all messaging into a single and clear strategic plan covering all elements of what voters see from us.

- Review the quantity of communications needed to fulfil that plan – be that direct mail, broadcast, publicity, leader's tour events, social media, or canvassing –to achieve election ambitions.

- Clarify local-national interaction and feedback loops, including local input into national campaigns.

- Identify 'best practice' strategic and creative development of messaging, communications and branding for different audiences and a subsequent proposal to implement findings against benchmarks.

- Identify 'best practice' in the use of focus groups and face-to-face research; including how technology can be used on the doorstep, and how this 'qualitative' research works together with 'quantitative' analysis.

- Revise the protocol for how the party should approach 'electoral pacts' with other parties based on learnings from 2019 as well as previous elections

- Revise the protocol for how the party should approach defectors in the future based on learning from 2019.

Summary of Findings

Vision and Purpose

- We lacked an overarching vision and purpose, beyond 2019 and Brexit.

- We lacked relevance to broad areas of the electorate.

- We coupled a lack of vision and relevance with a lack of strategy.

- The potential for a strong culture was undermined by bad practice.

- Lack of purpose and unity left us unprepared in 2019's perfect storm.

We lacked an overarching vision and purpose, beyond 2019 and Brexit

Feedback at all levels of the party – both in office as well as activists and campaigners – described a lack of clarity in what we stood for and what we would do in power, beyond stopping Brexit.

There is still a fundamental belief, indeed passion, for the sentiment expressed in the preamble to the constitution, but this has not been turned into a vision and strategy which guides the whole organisation.

- While Brexit did run against the entire grain of our values, those values were not articulated; we said we wanted to Stop Brexit, we should have said why.

- Brexit was a moment in time – a seismic political issue, but a single issue nonetheless – choosing to run a campaign based around one issue left us without options.

- 'Stop Brexit' as a message – even without 'Revoke' – appeared to run contrary to what many knew to be a core Liberal Democrat principle of 'fairness'.

- It's unrealistic to say we should not have campaigned against Brexit, and many would have objected to a second referendum almost as strongly as to Revoke; however our 'if-this-then-that' policy of if-majority-then-revoke took explaining; it lacked much needed clarity

- There was a strong body of research rooted in principles of 'fairness' which had led to previous messaging ('Demand Better'). This was abandoned and subsequent messaging lacked the same depth of research.

- Research favoured surveys and statistical studies – often online – over face to face interactions, for example focus groups or doorstep conversations. Both are vital.

   'Our big failing was in not setting out an appealing, coherent, popular idea, which was supported by, not led by, our policies. If as a party we can achieve that in future, we will have made big steps towards a more successful election campaign'

'I don't think it should be all qual or all quant, but I do think that you can start listening to people to understand'

We lacked relevance to broad areas of the electorate

It would have been impossible to be part of the 2019 election without talking about Brexit, however we chose to talk about it in a way which made the Liberal Democrats feel irrelevant.

We were never likely to win the 'die-hard' Leave voters (about 20% of the electorate) but we effectively cut off the much bigger section of the electorate who were either less hard-line on Brexit or ambivalent either way. As a result, we also felt out of touch more generally, and did not appreciate how our lack of relevance to BAME audiences was to impact votes in a number of key seats.

The core vote strategy as originally designed was aimed at increasing the number of voters who understand what the party stands for and is defined in terms of values, not demography. At some point that broad range of social and economic values was reduced to being simply a 'Remainer.' That was a distortion of the strategy and reduced it to a targeting exercise.

By adopting a 'Pure Remain' position we lost focus on many areas of broader appeal.

- This failure to find a message with a broader appeal meant that in many cases local campaigns felt that they were not being supported by the national campaign, but instead were campaigning against it.

- In 17 of the top 20 seats where we came second, and a third of all the party's second place seats, BAME communities were numerically greater than the differential, in some cases substantially so.

- We actively chose not to target Leave voters – even though we needed some of them to vote for us in order for our target seats to be realistic opportunities – this made us look like a party who were willing to leave some people behind based on what they believe in.

> *'We didn't seem to have an answer to the problems facing the country. Our campaign felt like we wanted to Stop Brexit, do a bit on climate change, and leave everything else more or less the same but with a few nice giveaways. We didn't look like we were serious about the challenges facing the country that informed WHY people voted leave'*
>
> *'In a typical London constituency with a BAME population of 35%, in a three horse race a party needs roughly 40% of the vote to win. Polls show that Labour probably rely on 75% of the BAME electorate, so they start off with 26% in the bag and only need 21% of the remaining voters to win… if a party ignores the BAME community (35%) it has to get their 40% of the vote from the white community, which means it has to get 61% of the white vote to win'*

We coupled a lack of vision and relevance with a lack of strategy

Without a clear and inspiring vision which could resonate with a broad and diverse audience there was no guiding force for the various parts of the organisation to follow.

This was exacerbated by the lack of a clear strategy for how the organisation as a whole should operate; as a result the organisation is fragmented and lacks clarity of purpose.

- There is no single strategy which outlines our ambitions as an organisation, and how – in the current political, economic, and environmental context – we will use our collective resources in order to achieve those ambitions, over a period of years.
- There is no clear plan for how all the possible resources within the organisation contribute to delivering the strategic ambitions, which leads to duplication of effort, missed opportunities, and therefore wasted resources.

- Different areas of the organisation have their own individual areas of responsibility, which may or may not be aligned to the overall strategy; this covers all areas of the entire Liberal Democrat organisation.

- The three 'pillars' of the organisation – Parliamentary Party, Federal Party and Staff/HQ – as well as other areas of the party (state parties, regional parties, local government etc) are disjointed and run to their own agendas, as do their component parts.

- It is unclear how local-regional-national bodies work together and there is a wide lack consistency in quality of work in different areas.

> *'Organisations are easier to run when people are trying to do the same thing'*

> *'HQ basically needs to be something that facilitates across the network but instead it attempts to cascade and broadcast. That is a fundamental mindset'*

> *'for the kick-off to an election it felt like we hadn't run an election before… People just didn't really know what they were doing'*

The potential for a strong culture was undermined by bad practice

Despite all the turmoil and angst of 2019 there is in all we have seen a deep, inspiring, and resilient passion for what the Liberal Democrats stand for.

Well harnessed and nurtured there is a real opportunity for a strong and resilient culture of collaboration and diversity, which can deliver strong results.

However the evidence of 2019 is that this potential was undermined by cultural attitudes and behaviours which are at best an interference, and at worst obstructive; this includes those in leadership roles but also exists throughout the Liberal Democrat Party as a whole.

- There is a huge passion and optimism for what we can achieve as a party; often this leads to unrealistic expectations of what either an individual or a group can achieve.

- At all levels of the organisation there are diligent and hard-working groups and individuals; but in many places that led to stress, exhaustion and burnout.

- Our democratic roots encourage a fantastic degree of engagement in party activity; but that often leads to staff members managing member or committee discussions rather than being empowered to do their jobs.

- We are as critical of ourselves as we are of others; many talk of being under 'friendly fire' from our own members or colleagues, with mistakes viewed as personal failures.

- Members who have previously held office frequently contact staff – at all levels – offering views, advice and criticism. They expect to get heard and are disappointed if they are not. Staff feel that 'no' is an answer that cannot be given.

> *'It's a really Lib Dem thing that if one of the other parties accuse us of doing something dodgy, a lot of our members assume we have, rather than we've done something right and that others are making trouble'*

> *'I am a normal person and I'll get things wrong… if I get things wrong it is because I'm human not because I'm trying to do something bad.'*

> *'On the one hand the culture here is SO much better, its strong democratic traditions, it's a much nicer place to be, but the lack of command and control is a problem.'*

> *'[in TV audiences] The problem is, and this is true, if you get a lot of SNP supporters, they clap, and Corbyn supporters do. Our people don't do that.'*

> *'so, there was a small number of Lib Dems in the audience, but also, when they asked a question they did that Lib Dem thing of asking a difficult question challenging the Lib Dems' own position'*

Lack of purpose and unity left us unprepared in 2019's perfect storm

2019 was a unique year. The external environment was volatile, uncertain, complex and ambiguous. Within the Liberal Democrats, at the start of the year the organisation was under massive strain on numerous fronts.

It was financially struggling, politically weak, under-resourced and inadequately led even before having to contest local and European elections, hold a leadership contest, organise a by-election campaign and federal elections, not to mention a general election campaign.

While political fortunes changed through the European and local elections, other challenges remained; the organisation was ill equipped for the storm, exhausted and became a slave to circumstance and short-termist in outlook.

- Resources for planning a general election campaign were inadequate, and what resources were in place were consistently used to firefight other areas, leaving it woefully short.

- The 'usual' things which come with a new leader – refined messaging, their leadership stance, relationship building – simply did not have time to happen.

- The controversial 'Revoke' policy was put before conference as a means of avoiding a face-off between leader and party without due thought to the electoral implications.

- There was a view – including among senior party representatives – that should a major party adopt a Liberal Democrat policy, we must vacate that ground and take a new position, rather than trying to own it ourselves.

- When the party saw MRP polling showing them within a 5% swing of 200 seats it adopted that as the 'new reality' despite of the underlying reality of our lack of campaigning infrastructure in many of the new target seats; when later polling was moving against us we did not adjust sufficiently.

- Well researched messaging – although perhaps not ideal – was replaced without enough time to fully research the reaction to different policy and messages

- Assumptions were made that the electorate would like our new leader because she was different to the other two and we assumed that signing a petition for Revoke was similar to being willing to vote for it in a general election.

> *'It was like a marathon except every single day was a sprint, it was just constant, an absolute constant. Please God may 2019 never happen again!'*

> *'from 16 through to 19 we were operating as a tiny party with miniscule resources. And when the resources were suddenly more forthcoming, during and following the European elections, the problem was we hadn't got the capacity and scale of operation to use those resources to the optimum'*

> *'we were moving at 150mph, and that was overnight. I couldn't pee during the day. It was 200mph during the day'*

Clarity of Leadership and Decision making

Findings in this section:

- **There is a 'broken three-legged stool' of leader, CEO and president.**

- **A fragmented organisation led to low collaboration and isolated decision making.**

- **We have suffered from a huge loss of corporate memory and skills.**

- **We lack the simple tools to train both employees and volunteers.**

There is a 'broken three-legged stool' of leader, CEO and president

The arrival of a new leader and CEO in the same year exacerbated an existing problem; a lack of clarity and disconnect between three leadership roles responsible for interconnected bodies; the parliamentary party, the HQ operation, and the Federal Party.

This challenge has existed for many years; in the original plan for the party (not necessarily the solution) the leader was responsible for policy, and so chaired the Federal Policy Committee (FPC), and the president for the party organisation, and so chaired the Federal Executive (FE).

However the evolution of the system has created governance conflicts and challenges. For example, the subordination of the FPC to the 'Federal Board' oddly implies that the part of the structure the leader is responsible for – policy – is subordinate to the part the president is responsible for – organisation. This risks elevating campaigning over thinking and blurs the leadership roles of president and leader. The addition of the modern CEO role is vital but adds to the lack of clarity.

In 2019 the disconnect between the three offices created a vacuum; it was in part filled by a strong group around the leader which centralised decision making and meant that opportunities were missed for key information and resources to be shared.

It also created an unrealistic belief in the potential of both party and leader. Challenge to that belief was ignored; sometimes explicitly and consciously.

To be clear, this is the fault of a lack of clarity in the organisation about where power and decision-making lies; the failure is with the machine, as much as the individuals.

- The leader's team formed a group who were taking most of the key decisions, often in isolation of input from people or groups whose input might have led to different choices

- Challenge or disagreement often generated a negative reaction; many feel they were excluded from decision making groups once they had expressed concern.

- The word 'hubris' was often used to describe the campaign attitude; while it was clearly unintentional there was a definite sense of believing our own hype.

- Positive signals were taken as a sign of progress and affirmation; but negative signals were not treated in the same way. One MRP poll was believed, but the plan wasn't sufficiently changed when subsequent polling showed a decline in potential gains.

- Crucial decisions were made without proper consultation on preparedness for an election. If the consultation was happening it was ineffective; we were far from ready.

- Rather than empowering others with responsibility many decisions were taken by a small group of people around – and including – the leader; this included overhauling Messaging and the Manifesto; which had been developed and researched over time.

> *'When you looked at the seats we could theoretically win it was incredibly fragile... I was saying we don't have the capacity to resource that, and that won't sustain itself in a General Election. What was made clear was that it wasn't politically acceptable to be talking in an unambitious way'¬¬*

> *'That small group drunk the Kool Aid and believed she could do it'*

> *'In a campaign, as a leader you have unique things to do, that only you can do, and you have to not have responsibility for a lot of things... a lot needed to get signed off by the Leader and that's not a personal criticism, it just shouldn't have been allowed to happen'*

A fragmented organisation lead to low collaboration and isolated decision making

There is no clear structure balancing parliamentary party, HQ, local/regional/state parties and the Federal Party and members; instead how they interact varies with the leader.

In recent years there has been a serious disconnect between HQ staff, regional/state/local parties and the parliamentary party which has resulted in an atmosphere of distrust and disaffection and which affects staff morale.

There was no time in 2019 to make the extensive changes which are needed to ensure that the organisation is structured in a way that makes best use of its resources, but it is clear that this lack of clarity was severely detrimental to electoral success.

- There is no clear 'leadership team' where the three pillars of the party – political, operational, federal – can make cohesive decisions, simply, quickly, and effectively.

- The Federal Board – 40+ members – is not, cannot, and should not be that team.

- There is a lack of oversight, scrutiny and poor governance structures across the federal, state, regional and parliamentary parties, as well as evidence of a fundamental lack of collaboration within the staffing structures of the party

- Establishing a consistent view on who was 'in charge' how committees related to the senior roles of the party, and how governance worked proved effectively impossible.

- Staff changes, budget cuts, and personality clashes across senior leadership of the party were frequent. Difficult decisions had been put off or diluted.

- Decision making is opaque, with no clear responsibility for decisions or their basis, and executive lines of accountability are tortuous or non-existent.

- The staffing structure and staffing body has lacked proper investment and development over time, and does not provide appropriate oversight and strategic direction.

- The lack of connection between operational, political and governing parts of the party has created structures which foster a lack of collaboration and isolated decision making

- Teams were reacting to day-to-day issues rather than being part of a connected plan; many spoke of constantly feeling like they were 'fire-fighting'

- Constituencies operated as freestanding units. Frequently, neighbouring constituencies did not work together, some regional strategies were in place, many not.

> *'look at our structure compared with a normal organisation… the wild card that differentiates a political organisation is an elected political leader. We've not got right for a long time how we cope with that'*

> *'Part of the problem is that the committee structures are bonkers. No organisation would have a Board of 41 members.'*

> *'the many complex structures masquerade as democracy but prevent things getting done efficiently and effectively'*

We have suffered from a huge loss of corporate memory and skills
Over a period of years there has been a sustained erosion of experience in key skills and roles. There has been a huge loss of experience and we have missed the opportunity to pass on knowledge from people who have actually won elections.

This was partly driven by financial necessity; even so, the priority now must be to put the resources where the strategy requires them to be.

The principal area is in building campaigning resources in key target seats, over the duration of at least one parliamentary cycle, taking into account both local and national opportunities.

- The move towards an Obama style "field work model" post 2010, inadvertently lead to some seats losing experienced & skilled campaign organisers and restricted the ability to run strong community campaigns.

- We missed the benefit of traditional campaign organisers getting to know seats like the back of their hands, understanding local communities, the membership, MP and councillors' groups, demographics and seat statistics.

- Removal of regional campaign officer positions left seats with much reduced support, especially in training the campaigning skills needed for Lib Dem success.

- In a number of cases multi-skilled staff in constituencies were replaced with volunteer co-ordinators, resulting in a loss of artworking, copywriting, data analysis, message, strategy and campaign abilities with unique local know-how.

- In some seats well-qualified national staff were wasted because their added-value was not accepted; they were knocking on doors rather than using their particular skills.

- In other seats national staff didn't have the skills needed to add value and were only used pretty much as an additional casual volunteers.

- There is minimal budget for training, meaning that staff and volunteers are learning for themselves what should be learned through training based on expert knowledge gleaned from experience.

- Constituency-based staff were often appointed at the last minute, and only performed unskilled work – mainly phoning members and leading canvass teams.

- Experience in the voluntary party is undervalued. Many who have experience at running winning campaigns have become disengaged and key skills like messaging, local and regional media, strategic management have been lost as a result.

> *'Ever since 2010, the party has, or various bits of the party has been trying to find a silver bullet that gets around the need for a sustained building in target seats over time. There has been a consistent underpinning failure to invest in target seats, outside of a general election, over a decade… we did have an opportunity, but the party could not take advantage of it.'*

> *'Most members of the team who won this seat in the past were not involved this time round. Some just weren't asked, others didn't feel valued any more, and felt no connection with the local campaign at all.'*

We lack the simple tools to train both employees and volunteers
There is significant experience across the Liberal Democrat membership that could be more effectively used, but we are not identifying it and we lack simple tools to train people effectively.

The anti-Brexit increase in membership did not translate into an equivalent rise in effective activism - ultimately, the data shows that only 17% of members participated in the campaign, as against previous figures of over 30%.

Several constituencies reported high levels of enthusiasm among new recruits, but they were treated as though they knew what they were doing and morale, and activity, dropped sharply as the campaign progressed.

- Many things which could and should be done with digital technology are still being done without it.

- Volunteers joined in record numbers, with enthusiasm, but quickly found there was little or no guidance for what they could actually do to practically help.

- Simple tools for volunteers – from templates for social media users, to rebuttals for doorstep questions – were either non-existent or hard to find.

- Experienced field campaigners were in short supply.

- Successful seats tell a story of 'triaging' new members; identifying their skills and deploying them accordingly – this is best practice, but scarcely practised.

- 'Training at conference' exists, but conference is attended by only a fraction of members and given low training budgets we have not invested in best the best available technology to support our needs or develop and deliver enough training remotely.

- It is unclear which training and support should be provided by which body – local, national, regional – there is no consistency and resources are duplicated.

- ALDC provides useful support, training and tools but it is not universal.

- Other parties – especially Labour/Momentum – totally outclass us in bringing new campaigners on board and training them in the skills needed to support the party.

> *It felt like there were a lot of new campaigners who were being treated as if they knew what they were doing. That is how it felt, and one of the frustrations was getting to those people to let them know they could do more than just street stalls, which is where they'd started over Europe.*
>
> *'how you manage, train, monitor volunteers; we do it in places, but not in a joined up way. It becomes a postcode lottery. One seat might have a retired journo who can do things brilliantly, but other seats don't'*

Re-building campaigning excellence

- There was no clear long-term plan or strategy for the 2019 election.

- We lacked clarity of decision making and leadership.

- There were 'too many targets, not enough bullets'.

- Local campaigns lacked time, people, tools, or money.

- Disconnected national, regional and local campaigns caused antagonism.

- Our choices of message were wrong for too many or right for too few.

- How we communicated messages lacked strategy and creativity.

- Research and polling techniques used with mixed results.

- The Unite to Remain agreement was poorly handled.

There was no clear long-term plan or strategy for the 2019 election
Election wins can only be delivered when we start planning early, monitor progress continuously, and campaign intensively both locally and nationally on issues that are important to the electorate.

That long-term planning had not happened, and there was no 'oven ready' campaign plan.

There was a 'war-book', which was revised in early 2019, outlining plans for an election assumed to be in May 2022. It was based on a tight budget for 32 target seats (some already thought to be over-ambitious) and a manifesto that had already been signed off.

At that stage the plan was incomplete, and it was not revisited through the year. As events in 2019 swirled around the party was left without detailed plans and was simply moving from one major event to the next.

By the summer work had started on a new strategy now based on a series of major changes from the initial assumptions: European, local and by-election successes, newly commissioned MRP polling, a growing party membership, a new leader and deep dissatisfaction with both the government and the opposition leaders; but the new strategy could not make up for lost time.

The key decisions taken immediately before and during the campaign were not subject to the same research rigour as previous campaigns or messages, there was limited scenario planning, and key assumptions were left unchallenged.

When the election was called, a limited HQ staff was quickly augmented with many additional members and more funds, but lacked planning and tools to scale and employ new resources.

> *'All of the individual decisions are symptomatic of the central problem that there was no strategy taking us from where we were, to where we needed to go, and steps along the way. We had a series of disparate pieces of evidence used to build a wigwam of a message, but with no central pole in that tent'*

A lack of clarity on decision making and leadership

The chain of responsibility was muddied from the very start of the campaign. In theory, the chair of the FCEC should lead a general election campaign but as this is voluntary and is not always a full-time position, this role has in the past defaulted to the director of campaigns.

However, the working relationships between HQ and the leader's team were far from good, and the lines of responsibility and authority were not clear. Most people when asked 'who was in charge' would reply 'it wasn't clear' or 'I only know who it was on paper'.

This was not a smooth running machine, basing decisions on research and data, or able to respond to events as they unfolded.

The chaotic nature of decision making left no room for quick responses to information coming in from the constituencies.

- There was no clear leadership or effective chain of command; individual directors were operating individually rather than as part of a team and appointed officials were free to interfere in, or ignore, the executive function of the party.

- By the start of the general election campaign in October, HQ internal process had almost entirely broken down. Several significant personality clashes occurred, and no leadership was exerted to resolve them and establish better ways of working.

- A summary document lists ten named campaign groups which were meeting on a daily or weekly basis, in addition to groups working with specific candidates or the leader. The FCEC and the Campaign Management Group were not at the centre.

- The leader's team was involved in day-to-day decision making often requiring a degree of 'sign-off' which slowed things down and disempowered the executive staff.

- Many people took on hugely upweighted teams for the election – sometimes up to five times as big – without the requisite management experience or support.

- Many individuals were responsible for areas of the plan too large for any one person to feasibly manage, isolating decision making without checks and balances.

> *'The party needs to have one person, identified, that is responsible for running election campaigns, and that person needs to be given the power, and the budget, to do that and have to be held responsible for it.'*

> *'I don't know who was in charge. I was aware there was a group of people in a room, I don't know who was calling the shots in that room and communication coming out of that room wasn't good'*

Too many targets, not enough bullets

In February 2019 the 'target seats' were effectively the 2017 list. When the May local election results transformed the polls the party's limited professional workforce was switched to the European elections rather than winnable seats.

At the July high point in the polls the need for rigorous challenge of seat performance was replaced by the imperative to grow the list to maximise outcomes.

In the summer of 2019, new 'MRP' polling was received, showing the potential for never-before-seen Liberal Democrat success.

To make this list more realistic the 'top' 220 seats into a more realistic list of 40 top seats, 40 secondary targets, and 140 'if something amazing happens' seats. The Top 80 (40+40) was derived from previous general election results, MRP polls, and Euro poll projections

- The most fundamental pre-qualification for attaining target seat status, high local government representation (English seats), was ignored.

- Despite the large increase in central spending power there were never enough time or human resources to assist those seats to upgrade to a winning campaign.

- Neither was there capacity to tailor help, nor to be agile when the national tide turned. The additional 'defector' seats made this more acute.

- Evaluation of seats' progress by HQ was poor, feedback from them took too long to register.

- A failure by our commissioned polling company meant seat trend polling was inadequate, and canvassing data was unreliable.

- The re-deployments in the final fortnight were haphazard, leading to several avoidable seat losses and near-misses.

- The 'target list' was a political construct built on flimsy evidence of capacity to deliver either by local parties or through national input.

- Expectations internally and externally were significantly raised, making the outcome even more damaging.

- One result of over-stretch was insufficient attention paid to retaining held seats, and generally poor deployment of volunteer resources.

- We saw little evidence of challenges to the consequences of the enlarged target list being listened to, nor of serious consultation before the decision to call an early election.

- The longer-than-feasible list of target seats and short timescales exacerbated capacity issues which ALDC – who had provided much needed upweighted support – particularly felt, including a significant delivery problem with Freeposts via an external organisation.

'If 2019 shows anything its that choosing seat and applying "here's how you win" does not work; the only place it did work is where we had a really good track record. We have some excellent skills, in some places we are really good and know how to do that, but doing it on its own with no foundation over time doesn't work'

'If we're going to win target seats it needs a consistent long term build, consistent campaign staff who know the seats really well'

Local campaigns without the time, people, tools, or money.
While the list of target seats was too long, and overly optimistic, many seats simply lacked the resources they needed to support a campaign; While many in the party still consider the Liberal Democrats to be one of the best campaigning organisations in the country, it is clear that the breadth of skills in the party has been significantly depleted over the past decade.

Much of this can be linked to the loss of skilled staff and the failure to replace them, but we have also failed to continuously train our volunteer base. More and more important work has been centralised and gaps in knowledge in target seats was significant – particularly around use of desktop publishing software, utilising Connect, basic campaign planning and analysing data.

A lack of Connect and analytical skills at local level left seat teams unable to act upon the data; understanding real numbers and what they mean in context – and trusting that data – is critical to delivering high quality campaigns.

- Each seat is unique with its own team, candidate, demography, ways of working but lack of training and development has often depleted skills in the seat.

- Whereas our campaigns may have been innovative and smart at the peak of our by-election successes, many respondents were concerned that this culture of innovation had dried up in favour of just re-using old templates.

- Many activists are unable to commit to a residential course (Kickstart, Conference).

- Many candidates and volunteers made significant financial sacrifices in order to run &/or volunteer; many had been dealt unrealistic expectations.

- ALDC stepped in to use their extensive knowledge and experience, but there were severe issues with the scale of demand which caused missed deadlines and frustrations.

'[a late-addition target seat] began the General Election having never fought a serious campaign and didn't even use connect. But by the end of the campaign they hadn't had the opportunity to pick up the key skills. It's left nothing to build on.'

'The last time we were on top of our game was in 2010, when we had about 25 people, working day in day out with target seats, the vast majority over a 4 or 5 year window. After 2017 GE the number of posts in the equivalent team was cut down to 6'

'I gave up 20% of earning capacity, on top of the usual time, to have 1 day a week to focus on building volunteer capacity, for 3 years, and in August 2019, I quit my job. I quit, and campaigned'

Disconnected national, regional and local campaigns caused antagonism

The connection between local campaigning, regional organisation and national support appears to have totally broken down; often resulting in an atmosphere of distrust and disaffection.

Campaigners in constituencies felt marginalised by both policy decisions and campaign strategies. Some were not clear why they were, or were not, target seats, and when circumstances changed candidates often did not know they were no longer in target seats until they got a phone call from HQ asking them to campaign in another constituency.

The balance between local versus central control is considered to be seriously out of kilter. Constituencies felt they had no control over campaign literature, either its content or volume. Crucially, there appeared to be no way to send information to HQ, to influence decisions or strategies.

- There was a significant variation in regional strategies in place (or not); some constituencies worked well together, but others operated as freestanding disconnected units.

- There is variation in quality and consistency of processes across regions in many areas; from the way candidates are appointed through to best practice organisation – and a missed opportunity for peer-to-peer learning and consistent high standards.

- 'One-size-fits-all' content created centrally proved inappropriate for a diverse range of constituencies, and national content was remote and distinct from local content.

- Constituency level narratives, over time, have been about understanding communities, local champion candidates and our record; the presidential 'Jo for PM' message jarred.

- Rigid central campaign plans made little allowance for local knowledge; winning seats spoke of knowing the doorsteps where national mail would cause a problem

- Templates being released close to deadlines forced artworkers down a standard route.

> *'We were made a target seat at the start of the General Election campaign - however nobody actually told us this! We had no communication from LD HQ whatsoever. Indeed we only worked out we were a target seat from the literature that started arriving through our letter boxes.'*

> *'With the 40 - 40 plan we had no idea where we sat on the list or what to expect. That was never made clear at any point.'*

> *'Our data constantly showed the Conservatives ahead – yet a 'squeeze the Tories' message was imposed anyway against the wishes of the local team. Anyone who had knocked on a door here knew it was the wrong message'*

> *'it probably would have made more sense to knock off a couple of seats and spend the money on people to make communication links between local seats and people writing the direct mail'*

'We've always asked residents their views. We had a 'fly a kite' mentality where we'd give issues coverage and see if it generated response. If people cared we ran with it. This time there was none of it. No local polls or surveys but lots of imposed messages about leader and Brexit.'

Our choices of message were wrong for too many or right for too few

Given that we lacked an overarching vision, adopted a strategy that alienated a large chunk of the electorate, and were running so fast that we lacked proper planning and preparation it is hardly surprising that our overarching messages did not land well.

While Brexit was of course a dominant theme, leading with 'Stop Brexit' meant that we had boxed ourselves into a message that many found either alienating or irrelevant. The crucial and unappreciated information was that the majority of the population were not particularly 'extreme' on either Brexit or Remain. In fact the bulk of the population, between 40–60%, had either unclear views on Brexit, or did not see it as the main issue on which they would vote.

Much of the critique is that by saying 'Stop Brexit' we were 'ignoring the Brexit half of the population' – that is wrong; we were ignoring the potential votes in the half of the population who might have been persuaded to vote for us had we offered something more.

It is fair to say that we did have other policies – our manifesto which was largely applauded as economically sound and socially progressive (historically what might have been termed 'Stronger Economy, Fairer Society') – but those were not the messages we led with.

There is a fundamental difference between what people understand as the manifesto ('what they stand for') and what we mean by our manifesto (a detailed set of policies). Despite the detail in the policy booklet the perception was that we didn't offer anything else that might appeal to those who had voted for Brexit and that Jo wanted to become prime minister.

The specific research evidence against the 'Revoke Article 50' policy is mixed (John Curtice, British Election Survey) but it did alienate voters who were not hostile to a 'referendum on the deal', who might conceivably have been won over.

There is a crucial difference between being the leader of the Liberal Democrats – and therefore the lead 'message carrier' – and choosing to use your leader as the message to be carried.

Given the state of the polls at the time of the election (which was very different to what it was in the summer) and the likely squeeze to come, sending out millions of leaflets with 'Your Candidate For Prime Minister' on the front demonstrated the unrealistic optimism of our belief.

- The majority of Liberal Democrat target seats with a better chance of winning were Conservative-facing, and yet the party's leadership main message was Stop Brexit.

- While we did not overtly use the wording 'Revoke' in national communications it was the term which was used against us by our opponents.

- This failure to find a message with a broader appeal meant that in many cases local campaigns felt that they were not being supported by the national campaign, but instead were campaigning against it.

- We got 'pigeon-holed' into fringe issues, and – as with our core messages – had not prepared for how that would be presented by the media or the opposition

> *"Every gain we make by motivating our base is counteracted by a backlash on the other side. What we need in the United Kingdom is an agenda that speaks for all peripheral communities in our country – not just the left-behind towns & rural communities but also the deprived inner-city estates. This isn't about pitting London vs the North, or urban vs rural. It's about where power resides and whom it is wielded for'*

How we communicated messages lacked strategy and creativity

Our position in the media is always a challenge at election time; while there is a systemic problem of being the third party we made choices which exacerbated the challenges.

We did not think strategically enough about the choices being made for what the message was, when and how it was being deployed, and by whom. There was not clear oversight of a single plan that took into account the impact of one element the electorate was seeing upon another.

That was exacerbated because we either did not appreciate or wrongly thought certain core principles of creativity and communication did not apply to this election: that messages are built up over many years, that what you say is different to what people hear, and that what other people say about you is as much, if not more important than what you say about yourself.

Communicating in politics is tough; the level of news consumption is generally low. As such the level of consistency needs to be much higher (to keep landing the same message) as does the level of creativity (to land the same message in different ways.)

Our consistency over recent years has been very poor; our agenda has shifted to follow the volatile national dialogue, we have had multiple parliamentary party leaders and we lacked the unity of purpose which could sustain a message over time.

Creativity in how we communicated our messages was poor and behind that of the other parties, specifically in use of imagery and video over words and logic.

- Research and testing that had been conducted on our previous messaging platform (Demand Better) was not replicated on our new positioning and messages had not been put into focus groups or doorstep tested.

- We actively tried to use other leading personalities, but were unsuccessful; they do not have the same media appeal as the leader; but the Jo4PM claim was a bad setup for interviews.

- Our 'branding look' has been the same for years (Orange & Black with Bird) but we changed our style guide for this election, introducing new colours, shapes and ways of using text. Many have commented that they thought it was a poor replacement – style and branding opinion is often subjective – but the real challenge is that it was a change from what we have spent years investing in.

- We spent many years building a profile as a party of inclusivity; but then our Brexit positioning shut out a huge part of the electorate.

- Where we have previously won we have done so with local champion candidates fighting for local issues; but we led the campaign with 'Our Candidate for Prime Minister'.

- Our creativity, imagery and video were way behind where they needed to be; we said things logically, in words, we did not show people what it meant, in images; this applies equally to things we 'showed' people (images, videos, messages) to things we 'did' (for example how we used events and the leader's tour)

> *'there was not a strategy taking us from where we were, to where we need to go, and steps along the way. We had lots of bits, a series of disparate pieces of evidence used to build a wigwam of a message, but with no central pole in that tent'*

> *'We are weak on emotion, weak on imagery, weak on telling stories'*
> *'we are prone to being too clever by half, overthinking things and being too rational. We think in this weird, old school economist way that people are persuaded by their own rational interests and arguments, which is so far from the truth'*

Research and polling techniques used with mixed results

The party failed to use a wide range of evidence but since it failed to use the evidence it did have, never turning off its 'happy ears', the real problem was in the political use of data, not in how it was generated. Party insiders have questioned the use of MRP (multiple regression polling) as part of their explanation of why the party's targeting was so off. In fact, YouGov's last MRP of 10 December 2019 was not too far away from the final result, predicting that we would win 15 seats and that the Conservatives would win an overall majority. It failed only to predict the scale of the Conservative victory, although even that could have been spotted by looking at the trend. What happened instead was the party paid very great attention to the MRPs it commissioned, both of which were taken while the party was still on an upward trend in June and September 2019, but paid rather less attention to the publicly available MRPs that came out subsequently, which indicated catastrophically bad outcomes for the party.

A more substantial criticism is that the party relied excessively on purely quantitative techniques and failed to invest in qualitative research, such as focus groups, to gain insight into why people answered quantitative questions the way they did and to gather ideas and phrases that resonate with the public (in the manner of 'Get Brexit Done' and 'Take Back Control'). The problem is not new. A senior figure told us: 'This is a problem that we've had for the last three elections. Quant research without qual.' But it was made worse by the apparent inability of the party centrally to take on board what canvassers across the country were finding. Decent election campaigns treat canvassing not purely as a data collection exercise but, at least in the opening days of the campaign, as a kind of rolling focus group in which canvassers try out different ways of putting the party's case. But that feedback loop was never established. Canvass data when it was used at all, and it often was simply ignored, was used mainly to measure the size of the party's effort – it was a measure of input, not a way of monitoring the effects of those inputs.

But even if the party had invested in qualitative research to complement its quantitative research, we doubt whether the outcome would have been very different. That is because the quantitative research the party had, and the known gaps in that research, should have made the party act differently anyway.

The party ignored findings about campaign themes that had been thoroughly tested and were known to work and launched into new ones without research. 'Demand Better', for example, was ditched in favour of 'A Brighter Future' without similar testing or analysis. More seriously, the party was in possession of research that indicated that messages built around the ideas of 'fairness' and 'reciprocity' would have had resonance with the electorate.

The same is true of the evidence around the message that Jo Swinson was going to be prime minister. That message, whether fairly or unfairly, went down very badly, a fact that was picked up reasonably quickly in the polling and on the doorstep, and yet it was still being used weeks later. Part of the problem is the long lead-in time for leaflet-based campaigning but the theme continued for too long in other formats: 'It took us the best part of five days to stop [Jo] saying it in press interviews', a senior staffer told us.

In short, the party centrally suffered a bad case of 'happy ears', hearing only what it wanted to hear or what it thought it deserved to hear.

The Unite to Remain agreement was poorly handled
Unite to Remain provided the party with an opportunity to maximise its electoral support in key seats and practice its commitment to electoral reform and cooperation. However the electoral landscape shifted significantly between the Brecon and Radnorshire by-election in August and December 2019. Some of those local parties involved in being stood down by the party in place of Unite To Remain arrangements gave negative feedback on the process of being stood down. This included, perceived or actual, poor communication, dismissive attitudes and local parties poorly informed.
Agreements made between federal/national/local parties were in many cases – and in Wales specifically – felt to have been breached. This has left the infrastructure, morale and membership of some local parties who participated significantly weaker.

- The highly confidential nature of the discussions and the extent to which information was shared with local, state and regional party officers caused significant fallout.

- Many submissions identified a failure to communicate properly across the party why Lib Dems could not stand down for Labour MPs, however pro-Remain those individual MPs were.

> *'The process of handling standing seats down was poor – accepted that it would be messy but it shouldn't have been accepted – need for better communication with local parties and as much transparency as possible.'*

> *'Unite to Remain was poorly handled and the decisions regarding which seats to stand aside in were clearly made with party interests in mind rather than the Remain objective….Unite to Remain needed to be handled much better internally. The apparent secrecy and lack of involvement of local parties throughout the negotiations was in part responsible for the issues we experienced locally. Had this been handled with greater sensitivity and involvement from parties concerned then it's possible we could have reached an agreement without the disruptive internal disputes'*

Appendix

Vision and purpose

We must reinvigorate the entire organisation with a clear vision and purpose, based around returning to Liberal Democrat values, and the subsequent long-term strategy to implement it.

Our vision must touch the hearts and minds of over a majority of the electorate, be modern yet coherent with long-standing liberal principles upon which the United Kingdom is built.
The appeal of our Liberal vision must be inherently wide and we should be determined to take our values to all parts of society and explain why they are relevant to everyone whatever their background. Niche topics win niche support.

We must be clear on what a strategy is, what our strategy is, and what it means to adhere to a strategy in line with an organisational purpose. To understand and plan according to these core concepts of political power is to distinguish ourselves from a single issue pressure group.

Summary findings:

- **We lacked an overarching vision and purpose, beyond 2019 and Brexit.**

- **We lacked relevance to broad areas of the electorate.**

- **We coupled a lack of vision and relevance with a lack of strategy.**

- **The potential for a strong culture was undermined by bad practice.**

- **Lack of purpose and unity left us unprepared in 2019's perfect storm.**

Recommendations and Actions

1a **Based on the lives of ordinary people in the country today, create an inspiring, over-arching and compelling vision which can guide the entire Liberal Democrats organisation for the duration of a parliament, ideally longer**

The leader is accountable for this action, in collaboration with the CEO (responsible for developing and managing a robust process) and the president (responsible for ensuring due consultation among members and supporters).

This allocation of accountability and responsibility is interdependent on recommendation 2a regarding the need to clarify the roles and responsibilities of leader, president and CEO.
Resource and plan for this action should be signed off at Federal Board by 30 September 2020.

It should be completed, including broad consultation before 30 September 2021 and must:

i.   Start with a deep understanding of ordinary people's lives across diverse communities in all parts of the country.

ii. Appreciate current national and international context but based on our principles and constitution
.

iii. Make our purpose, 'the preamble to the constitution', relevant and practical for the next 5–10 years.

iv. Define and giving purpose to how we work together, based on what we strive to achieve in the world.

v. Specifically explore the cultural changes needed in order for the organisation to succeed

vi. Account for the fact that this influences everything we do; it is a crucial input

1b Implement the findings of the Alderdice review into party Diversity, in full, with urgency

The president is accountable for this action, in collaboration with the CEO and party leader
Any deviation from the diversity review recommendations should be reviewed by that review panel's chair, in conjunction with LDCRE.

Resource and plan should be signed off at Federal Board by 30 September 2020 and must:

i. Include the main change that the review calls for, which is changing the culture of the party to embed at all levels the concerns and interests of BAME communities and issues in all its activities, reaches out to the BAME communities and actively plans how it will achieve real integration at all levels.

ii. Ensure resources – paid staff and investment – are in place to implement this.

1c Develop a clear strategy which outlines ambitions for electoral success, in all types of elections, over the likely parliamentary period and how the entire organisation – national, state, regional, local, volunteer and employed – needs to use its collective resources to achieve that.

The CEO is accountable for this action, in collaboration with the president and party leader.

The strategy should be signed off at Federal Board no later than March 2021 and must:

i. Take the developed purpose and diversity plans as critical and interdependent inputs.

ii. Reflect the need for investment in local parties earlier and over a longer period.

iii. Review ongoing governance of all areas of the party; local, national and regional parties, The Parliamentary Party, HQ Operations, The Federal Party, including the Federal Board, and all connected organisations and committees – and incorporate into the strategic direction.

iv. Leverage input from research and testing amongst a broad electorate, and specifically BAME communities and non Lib Dems, balancing breadth (quant) as well as personal, emotional reaction (qual).

v.   Analyse all party bodies' objectives and resources and re-allocating them according to the strategy.

vi.   Specifically detail how we use digital and data – in all guises – as an enabler and accelerator of the strategy across all areas of the organisation.

vii.   Specifically detail how we resource and manage all training and development needs across the entire organisation; including the training of volunteer staff as a permanent requirement outside election time.

viii.   Identify the long-term plan and role for fundraising in supporting the strategy, including building of a narrative for long term donor support with an aim to secure material funding in the years prior as well as the year of an election.

ix.   include but not be limited to how we create policy and messaging, which need to be outputs not inputs.

x.   Include the plan for internal communications resource to ensure that all areas of the organisation are connected and working towards the same strategy.

xi.   Potential risks to strategy, and resulting scenario plans, to be monitored by an identified body regularly throughout the Parliament, and at least every two months in the 12 months

Clarity of leadership and decision making

We must work together with clarity of leadership and the identified responsibilities which enable efficient and effective use of resources

Throughout the entire organisation, from leader, CEO and president of the party, all the way through to local campaigners in non-target seats, we must constantly be striving to learn and to develop. History must guide us as much as day-to-day feedback in the quest for progress.

To maximise our resources, skills and capacity as a party we need roles and responsibilities, which are clearly defined to guide decision making that is timely, rooted in evidence and made by appropriate bodies and individuals within the party.

Even at its lowest ebbs, the Liberal Democrats attract tremendous resources; clarity on strategy, roles and responsibilities and resources at our disposal enable us to identify where we need to leverage technology, train and improve at all levels of the organisation.

Summary Findings:

- **There is a 'broken three-legged stool' of leader, CEO and president.**

- **A fragmented organisation led to low collaboration and isolated decision making.**

- **We have suffered from a huge loss of corporate memory and skills.**

- **We lack the simple tools and procedures to train both employees and volunteers.**

Recommendations and Actions

2a Clarify, codify, and communicate the Roles and remits of the leader, CEO and president

The president is accountable for this action, in collaboration with the CEO and party leader Decisions should be presented to FASC and confirmed to Federal Board by 30 September 2020 and must:

i.   Contain general guidelines to clarify which decisions sit with which leader.

ii.   Be reviewed and agreed on by the leader, CEO and president each time there is a change in office.

iii. Be understood and agreed initially by FASC for oversight, with any changes to general guidelines communicated widely.

iv.   Ensure that any decision by the parliamentary party to support or precipitate a likely election is done with due consultation with the CEO and the president and with consideration to the readiness of the entire organisation for a successful election campaign.

v.   Ensure that none of the leader, CEO and president should be able to unilaterally overturn agreed strategy, manifesto, messaging or branding.

2b In response to overall purpose and strategic direction (1a & 1c) a clear plan must be resourced to implement the necessary changes to organisational culture, processes, structures and resources

The CEO is accountable for this action, in collaboration with the president and party leader. Resource and plan for this action should be presented to (current appropriate committee?) and signed off at Federal Board by 31 March 2021 and must

i.   Adequately resource a role to specifically monitor and manage this 'change process' (this cannot be an addition to someone's existing role).

ii.   Include a proposal for when all Party Bodies, Organisations, (national, regional and local) senior managers and party officers should be in place and operating to plans directly contributing towards the overall strategy.

iii. Analyse the current and necessary attitudes, behaviours, talents, tools and processes needed for success and a plan for addressing any gaps, including compliance.

iv.   Develop policies and practices in line with appropriate modern businesses / other sectors and benchmark ourselves against industry standards where they exist for the relevant departments.

v.   Outline how performance will be monitored for all roles, including those in leadership roles at all levels. For the avoidance of doubt the party leader, president and CEO should also participate.

vi.   Identify a process by which the party can understand and monitor available resources (voluntary, employed, donated) in order to deploy them against strategic needs.

vii. Clarify how the views and talents of members and officers at all levels are to be used as key input into specific topics to create the 'feedback loops' that allow us to monitor progress

Re-building campaigning excellence

We must focus our combined efforts on creating campaigns that deliver success at General Elections

We can only achieve the party's purpose by winning power, and wins can only be delivered when we plan early, monitor progress continuously, and train relentlessly the intensive campaigning skills needed locally and nationally on issues that are important to the electorate.

We must integrate local and national knowledge and data when campaigning and collaborate accordingly; recognising that a basic condition for success is a strong local government base, built over time, and well trained, properly resourced and brilliantly organised local campaigns.

We must train, develop, and employ the skills needed to deliver brilliant and well managed 'long' and 'short' campaigns on ground and in the air; allowing us to 'cash-in' at election time on the hard yards put in outside election time.

Summary findings:

- There was no clear long-term plan or strategy for the 2019 election.

- We lacked clarity of decision making and leadership.

- There were 'too many targets, not enough bullets'.

- Local campaigns without the time, people, tools, or money.

- Disconnected National, Regional and Local campaigns caused antagonism.

- Our choices of message were wrong for too many or right for too few.

- How we communicated messages lacked strategy and creativity.

- Research and polling techniques use with mixed results.

- The Unite to Remain agreement was poorly handled.

Recommendations and Actions

3a **Start now to develop a specific strategy which outlines our ambitions for the next General Election and the plan for how we intend to use our collective resources to achieve that.**

The CEO is accountable for this action, in collaboration with the president and party leader. Resource and plan for this action should be presented to FCEC and signed off at Federal Board by 30 September 2020, in order to commence implementation no later than June 2021, following the local elections, and must:

i.   Identify the criteria by which we can confidently deem ourselves 'ready' to fight a general election.

ii.   Clarify the criteria for deciding which seats should be targets to win at the next general election, and a plan for communicating those criteria to constituency teams.

iii.   Ensure adequate time and resources are available to build enough and reliable canvas data from which to run a successful election campaign (see also 3b vi).

iv.   At national level establish a project to analyse and learn from canvass data collected in target seats over the last 3 GEs to assist in poll and focus group triangulation.

v.   Identify and quantify the human and financial resources needed to develop and deliver a credible programme of parliamentary electoral growth based on individual constituency campaigns supported by HQ.

vi.   Revise targeting strategy to include BAME electorate as needed particularly in the most diverse areas

vii.   Develop specific plans for support needed to hold every held seat, with specific attention to the leader's seat.

viii.   [With consideration to overall governance review, 1.c.iii] review and revise procedures for approval of candidates, including how we review their social media history.

ix.   Identify the contributing role of other elections (local, council, by, etc) in achieving general election success.

x.   Articulate the sound data, evidence, learning and experience on which it has been based and on which scenario planning actions will be decided.

xi.   Set out how progress will be resourced, measured and monitored, nationally and in constituencies.

xii.   Identify how the dialogue of ideas and active feedback loops throughout the party and organisation will shape the plans and the technology needed to make that happen.

3b Understand and put in place the training, staffing and fundraising resources needed to win in target seats, achieve our ambitions in aspiring target seats, and support all other seats as needed.

The CEO is accountable for this action, in collaboration with the president and party leader.
Resource and plan for this action should be presented to (FCEC) and signed off at Federal Board by 31 December 2020, in order adjust plans as needed for Local elections in Spring 2021 and must:

ii.   Recognise that the majority of seats in which we stand are not target seats and specifically clarifies how we resource and develop these seats.

iii.   Ensure every local party and all seats have a pathway to step-by-step improvement and political development – not just target seats – and use each GE as an opportunity to leverage campaign activity.

iv. Include a specific offer or programme for those local parties/regions that need to rebalance resources after the impact of Unite To Remain arrangements.

v. Build a narrative for long term donor support with an aim to secure material funding in the years prior as well as the year of an election.

vi. Identify the key skills and training needed in target seats for agents and candidates, including training for candidates in their role as 'local leader.

vii. Include support for training on self-sustaining funding, campaigning and voter ID model in support of vigorous year-round campaign activity

viii. Every target seat needs to build a constituency-wide canvass data base, regularly updated, and be trained to develop the interpretive skills needed to deliver appropriate messages and campaigns across the whole seat.

ix. Work collaboratively with ALDC to identify the roles and responsibilities for HQ and ALDC in developing / upskilling election-winning skills locally & nationally, whilst respecting ALDC's distinctive position in the party as a membership organisation

x. Enable the party to invest in people and pay commensurate salaries for crucial, key roles that it identifies as critical to the effective management of the party and elections

xi. Identify best practice in how local organisations are already training brilliantly in the party, and in use of digital technology and peer-to-peer learning systems with a plan for implementing learnings.

xii. Include plans for fundraising, notably how we raise funds for election specific requirements outside of election periods.

xiii. Plan and budget for appropriate remuneration of key staff – specifically fully trained organisers – in identified target seats, to be employed in time for Local Elections in 2021, and take into account PPCs' individual circumstances when planning what a seat needs to be successful.

xiv. Outline plans for how we achieve necessary 'scale-up' in staffing, not just in HQ before, during and after an election, including identified roles, plans for filling roles and appropriate remuneration.

xv. Specify the roles and responsibilities of state parties, regional parties and necessary training to develop strong plans in all regions and encourage constituency co-operation.

3c Understand and put in place the resources and processes needed for the development and implementation of inspiring and successful General Election campaigns

The CEO is accountable for this action, in collaboration with the party leader and president. Resource and plan for this action should be presented to (FCEC?) and signed off at Federal Board by 31 March 2021 and must:

i. Separate the role of the chair of FCEC from the general election campaign lead role. The campaign

lead role should be full time for the duration of the election period and remunerated if necessary.

ii. Develop a straightforward and transparent decision-making process – including management of crises and unknowns – which the campaign general election campaign chair has authority to manage.

iii. Unify planning of all messaging into a single and clear strategic plan covering all elements of what voters see from us (not just 'comms'). In an election period this should have a single person delivering just this plan, with appropriate team resource to manage, and with identified reporting lines to CEO, leader and president.

iv. Review the quantity of communications needed to fulfil that plan – be that direct mail, broadcast, publicity, leader's tour events, social media, or canvassing – in order to achieve electoral ambitions.

v. Clarify local-national interaction and feedback loops, including local input into national campaigns

vi. Enable the party to develop policies and practices in line with most modern businesses and benchmark ourselves against industry standards where they exist.

vii. Identify 'best practice' strategic and creative development of messaging, communications and branding, for different audiences, and a subsequent proposal to implement findings vs benchmarks.

viii. Recognise the time and consistency needed for messages to land and build 'the brand' including maintaining a draft manifesto and messaging based on the strategy for at least 18 months before an election.

ix. Identify 'best practice' in the use of focus groups and face-to-face research; including how technology can be used on the doorstep, and how this 'qualitative' research works together with 'quantitative' analysis.

x. Revise the protocol for how the party should approach 'electoral pacts' with other parties in the future based on learnings from 2019 as well as previous elections.

xi. Revise the protocol for how the party should approach defectors in the future based on learnings from 2019.

Implementing the recommendations of the Review.

The publication of previous reviews has been rejected because some of the recommendations were not accepted. As such our 'core' recommendation is that we embed the findings of the review with a clear plan of action. The CEO, party president and party leader are ultimately accountable for implementing the recommendations, and for ensuring that actions are assigned to owners with the power to implement the findings.

Acceptance and Rejection
The first job of the Federal Board is to review the list of recommendations and accept or reject them individually. If a recommendation is rejected it must be clear why it has been rejected. Any rejection of a recommendation must be the exception and only on very good grounds which are then accepted by the review chair.

The Federal Board also needs to clarify how individual state parties are expected to adopt and report back on recommendations, in accordance with their specific remits and responsibilities.

Assignment of Owners
Each recommendation has been assigned to one of the leader, president or CEO to be accountable for. They are accountable for ensuring that each action has an owner – which could be them – a specific person or post which can be held accountable not a generic committee or group within the party.

It is vital that action owners get the tools and authority that they need in order to effect the change. Once the Federal Board has decided that the recommendation is accepted, it will adopt an ethos of collective responsibility; it would be damaging for individual board members to argue against it and the Federal Board should be a role model the spirit of unity which will be needed in order for change to succeed.

Importance of Planning
Some recommendations will be quick wins and can be actioned immediately and therefore require little or no planning, others will require milestones with planned dates.

A project manager (or a member of Federal Board or other volunteer with a project management background) should be assigned to this project to ensure that actions happen on time.

One of the key actions (2b) requires the party to properly resource the implementation of the overarching changes which need to happen across the party; however this does not absolve the leader, president and CEO of their responsibilities, and they are expected to be the accountable representatives to the Federal Board and the review chair for the action plans within their remits (which should include resources required (financial, staffing, paid or voluntary), how the change will be implemented, who do they need to convince, what are potential blockers, what are timescales and what are success criteria.

Reporting Back
A monthly report should be produced by the project manager – in conjunction with action owners – to

show how the action is progressing. showing progress against milestones and detail any issues encountered, including anything which might affect the agreed timescales. This report should be sent to the members of the Federal Audit and Scrutiny Committee in time for them to review it and communicate any challenges to members of the Federal Board and the review chair.

The review chair will attend Federal Board on a quarterly basis to receive feedback from action owners

The review process

The aim of this review has been to clearly understand what happened over the course of 2019 and the elections, but more crucially to understand why. The panel concluded early on that it would be too easy to conclude that a particular policy or person or decision was to blame; the important task was to understand why policies were chosen, how decisions were made, and what needs to change in the way we run elections.

Over the course of 16 weeks the panel has sought to get an in-depth knowledge of the key areas which impacted the election result:

- strategy, planning and decision making

- structures, systems and processes

- culture in the party and ways of working

- the 'air war' communications and national messaging

- The 'ground war' local and constituency campaigning.

Inputs into this process have been extensive and intensive. We have requested submissions from all current MPs, all former Lib Dem MPs, as well as candidates in key target seats (both Conservative and Labour facing). All regional chairs have been asked for submissions, and both Welsh and Scottish parties have contributed. Many individual constituencies, regions, local organisations, party bodies and functional teams have conducted their own reviews which have been subsequently sent into the panel. There have been many hours of 1-2-1 interviews between the panel and key decision makers in the parliamentary party, at 'HQ' and with other team members across the organisation, including ALDC. In total we have had well over 300 separate contributions.

Hundreds of members, constituency teams, donors, door knockers and other activists have sent in their own reflections and submissions; all have been read, as have many external reports and research.

We have reviewed the 20,000+ survey responses – which were divided up among the panel to digest – and had sight of all the key documents and decisions leading up to 12 December 2019.

The panel decided that the work should continue through the Coronavirus crisis, at which point discussions, 'round-tables' and interviews started to be conducted remotely. It wasn't ideal but nor do we feel it has impacted our conclusions. The cancelling of conference meant that sadly we could not have the full and vocal input from members able to make it to York. In spite of that we are confident that our conclusions are well informed by the depth and breadth of input we have received.

Where we have drawn conclusions and made recommendations it has been based on multiple sources of evidence; when we uncovered more contentious issues we have sought to corroborate them. Where things remain unclear and need further investigation we have sought to point the way without predicating the end result.

Crucially, we have sought to provide guidance for how the output of the review should be embedded into the operations of the party so it is implemented and monitored over the course of this parliament and beyond.

This review was commissioned by the Liberal Democrat's Federal Audit and Scrutiny Committee.

The review panel

Dorothy Thornhill (Chair)
Party member since 1987, former Councillor and elected mayor of Watford, peer, campaigner and not a party insider!

Andrew Stunell
Gained a seat on 3 different councils, ran ALDC for 8 years, candidate in 8 general elections, winning 4, and in 2019 was an activist in a target seat

Annelou Van Egmond
Vice-President of ALDE. Formerly responsible for strategy, operations and finance for the election campaigns of political party Democrats 66 in The Netherlands.

Ben Goodwin
Broadland PPC in 2019. Former RAF Wing Commander & fighter pilot.

Carole Ford
Council, Scottish Parliament and GE candidate, the Scottish spokesperson on Children and Young People, and the national Policy Convener

David Howarth
Joined the party in the 1970s, became a councillor, leader of the council, MP, and Electoral Commissioner, and is, professionally, Professor of Law and Public Policy at Cambridge

Elizabeth Desmond
Senior leader in the asset management industry. Liberal Democrat since 2016.

Helena Cole
Long time Liberal Democrat, current Chair of the Federal Audit and Scrutiny Committee and Finance Director

Johnny Corbett (Staff and Secretariat)
Party member. Business, marketing and communications consultant.

Juergen Maier
Former CEO of Siemens UK, UK Industrialist and business adviser

Justin Ash
Long time Liberal Democrat member with wide ranging experience across a number of businesses

Rhys Taylor
Councillor in Cardiff and former Welsh Senedd and UK Parliamentary candidate

Roderick Lynch
Chair of Liberal Democrats Campaign for Racial Equality and Liberal Democrat FASC auditor. Council election candidate, local activist and donor. Businessman and Non Exec

Sara Bedford
A member and activist for 35 years, former office holder at all levels of the party. A councillor for 25 years and now Leader of Three Rivers District Council.

Shaffaq Mohammed
Leader of the Lib Dem's on Sheffield City Council, Former Liberal Democrat MEP for Yorkshire and the Humber 2019-2020

Steve Jolly
Former Head of National Campaigns and party activist