

Campaigning National Occupational Standards





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Introduction

The development of the National Occupational Standards (NOS) has involved a number of discussions and key decisions about their scope.

What do we mean by 'campaigning'?

In discussions with the working group, convened for the life of the development of the NOS, 'campaigning' has been defined as:

*"The mobilisation of forces by organisations to influence others in order to effect an identified and desired social, economic, environmental or political change or to prevent a detrimental change by others."*¹

The NOS are intended to encompass a range of campaigning roles in organisations of differing sizes and complexities in each of the UK nations. The NOS describe the high level, strategic and policy making functions carried out by those from director level to those that assist the campaign through carrying out supporting functions.

What do we mean by the word 'Campaign'?

These NOS only reference 'the campaign' – singular – regardless of whether the organisation is running more than one campaign at any one time. The reason for this is that the same process, or set of functions, will need to be employed for each and every campaign; these are the functions captured by and described in this set of NOS.

Beneficiaries

We have used the term 'beneficiary' to describe anyone – or anything – that may benefit from the campaign taking place and/or its positive outcome. We recognise that not all organisations use this terminology, or will indeed be able to identify or engage with their beneficiaries, therefore we have added the caveat 'where appropriate' to address this. This term is identified in the **glossary** along with other key terms.

Core functions rather than tactics

The NOS focus on the core functions that are required to successfully deliver a campaign, in other words they do not cover every single activity carried out by campaigners. For this reason you will not find units within these NOS covering individual tactics such as organising events, rallies or petitions, as a vast number of tactics are used by different campaigns depending on the subject, audience and target. It is important to remember that the intent of NOS is to describe the functions involved and not be a 'how to' guide for campaigning. Instead, generic references to tactics have been threaded throughout the standards.

¹Adapted from the definition given by NCVO in "The Good Campaigns Guide" (2005)

We don't expect every standard to be relevant to every campaigner.

The development process very much centred on the philosophy that, when it comes to campaigning, 'one size does not fit all'. The standards are intended to reflect the fact that campaigning is a diverse, multi-faceted activity that needs innovation and creativity to succeed and to reach, and influence, a multitude of audiences and targets. For this reason, the standards are broad in their approach.

There are many other standards that can be used in conjunction with the standards for Campaigning.

Users of these standards are encouraged to explore the huge variety of other NOS which are publicly available here: www.ukstandards.org

The UK Workforce Hub has produced a number of other sets of NOS with a specific focus on the Voluntary and Community Sector, including:

- Management of Volunteers
- Fundraising
- Trustees and Management Committee Members in the Voluntary and Community Sector

There are also a number of 'cross-sector' standards. These describe 'generic' activities that, although they might be carried out in different contexts, the function that is carried out will be the same, whether it is in a campaigning organisation, or an engineering company, for example. The cross-sector standards cover:

- Administration
- Management and Leadership
- Customer Service
- IT

The standards in campaigning can be combined with any others to build up a set of standards that is unique to your own role and context.

National Occupational Standards have certain requirements in terms of content and layout.

Title of the Unit

This is the broad function described in the standard.

Overview

This 'sets the scene' and describes what the standard is about and what it covers, this helps to contextualise the performance criteria and knowledge and understanding.

Performance criteria

These are statements of critical performance, written in outcome terms. They describe the activities, or functions, that an individual should be able to perform to be considered competent in their job role.

Knowledge and understanding

These are statements of required knowledge that underpin the performance criteria.

The NOS for campaigning include two additional components:

Skills

These describe the skills that are required to effectively meet the standards of performance and knowledge in each unit.

Behaviours

These are the behaviours that are required to complement the performance, knowledge and skills. A successful campaigner should be able to 'switch on' these behaviours as and when required.

The Campaign Cycle²



²Adapted from the definition given by NCVO in The Good Campaigns Guide 2005



Identify and prioritise issues on which to campaign

Overview

What are we campaigning on?

This unit addresses considerations such as relevance, practicability, legitimacy, timing, and the campaigning environment.

It is applicable to all types of campaigns from narrowly targeted campaigns to mass-participation campaigns, to reactive campaigns such as those proposed by beneficiaries and supporters.

It is about prioritising issues by assessing the feasibility of conducting a campaign based on the idea, and determining the potential for collaborative working.

Performance criteria

In order to identify and prioritise issues on which to campaign, you should be able to:

1. Ensure that you are up-to-date with the environment in which your organisation operates, and successful campaigning techniques
2. Using appropriate means, identify issues relevant to your organisation including the needs of **beneficiaries**, where appropriate
3. Identify and prioritise the legitimacy of campaign issues based on clear justification and an evidence base
4. Determine to what extent and how the identified campaign issues are being addressed by another organisation or campaign
5. Discuss and agree with relevant colleagues whether your organisation is appropriately resourced to campaign on the issues that have been identified
6. Determine the potential for collaborative campaigning with other organisations or other parts of your organisation
7. Identify factors, such as legal and regulatory, and any practical constraints, such as **resources** or timing, that may affect the practicability and achievability of any campaign
8. Assess and frame the issue within the context in which the organisation operates



Knowledge and understanding

In order to identify and prioritise issues on which to campaign, you will need to know and understand the following:

- a) The process involved and techniques used in identifying campaigning issues
- b) How to determine the potential results, both positive and negative, of an identified campaign
- c) The wider campaigning environment and the impact this has on your current and future potential campaigning activity
- d) Campaigning techniques and strategies and the information sources for this
- e) The purpose and motivation of your organisation
- f) Where appropriate, the needs of your organisation's beneficiaries and how to find out what these are
- g) Ways of involving and consulting with your organisation's beneficiaries, as appropriate
- h) The nature and extent of the organisation's responsibility to its beneficiaries, where appropriate, and stakeholders
 - i) The value of collaborative campaigning
 - j) The value of involving those that will benefit from the campaign and the roles that they can fulfil within the campaign
- k) Where appropriate, the merits of different methods of consultation and involvement with your organisation's beneficiaries
- l) The environment and context in which your organisation operates
- m) The legal environment and rights of campaigners within the context of the organisation
- n) Successful campaigning methods and how to assess their relevance to the campaign idea and resources available
- o) The differences between proactive, strategic campaigning and reactive campaigning



Skills

- Strategic awareness
- Critical thinking and analysis
- Decision making
- Leadership
- Judgement
- Communication

Behaviours you need to be able to display

- Empathy
- Open-mindedness
- Realism
- Drive
- Self-motivation
- Enthusiasm
- Tenacity
- Honesty
- Persuasiveness
- Focus



Develop a vision for the campaign

Overview

What does success look like?

Once an issue has been identified as requiring a campaign, a vision needs to be developed that sets out “what the world will look like” once the campaign has achieved its aims.

This is an important basis from which to plan strategy and, crucially, win support from those both within the organisation and its stakeholders and, ultimately, from the campaign target. In some cases the best way to win support from the target is in partnership with another organisation or organisations, and the potential for this should be considered when developing the vision.

Performance criteria

In order to develop a vision for the campaign, you should be able to:

1. Establish the purpose of the campaign
2. Identify and agree what the campaign wants to achieve and the final **outcome**
3. Determine **aims** and **objectives** for the campaign that are feasible
4. Evaluate the value of collaborative campaigning and, where appropriate, identify organisations with sympathetic **values** and priorities
5. Review legal, regulatory and other factors that will **impact** on the campaign **aims**
6. Where appropriate present your vision to relevant **decision makers** and **stakeholders**
7. Where necessary, negotiate with **decision makers** to gain agreement to the campaign vision
8. Using appropriate techniques, win support for the vision from **stakeholders** and potential **coalition** organisations, as appropriate
9. Report to the **campaign team**, as appropriate, the **outcome** and any conditions or recommendations on agreement from **stakeholders**



Knowledge and understanding

In order to develop a vision for the campaign, you will need to know and understand the following:

- a) What the campaign purpose is and what aims does it want to achieve
- b) How to determine aims and objectives that are feasible
- c) How to assess what the campaign can realistically achieve
- d) The value of collaborative campaigning
- e) The legal, regulatory and other factors relevant to the campaign vision
- f) The different methods for assessing what is achievable and the circumstances under which to use them
- g) The decision-making processes and how they can be influenced
- h) The context of how the campaign fits with other organisations and ongoing campaigns

Skills

- Strategic awareness
- Negotiation
- Presentation
- Communication

Behaviours you need to be able to display

- Enthusiasm
- Persuasiveness
- Drive
- Resilience
- Creativity
- Innovation



Carry out research on the campaign issue

Overview

What do we know, and what do we need to know?

Some campaigns are conceived because hard data suggest that a campaign might be able to influence an issue of importance to the organisation's beneficiaries. Many others, however, arise from anecdotal evidence or "gut feeling" of perceived need and this may not be enough to persuade potential supporters to back the campaign.

In such circumstances, research can supply facts and figures that strengthen your message or argument. Research, which may be commissioned via an external body, or carried out internally, can be used to legitimise the cause and provide a means of measuring progress towards achieving the campaign's objectives. Research can also have the opposite effect, by disproving claims or anecdotal evidence, thus requiring a review or modification of aims.

Research should be approached honestly and objectively and used to inform ethical decisions about the campaign.



Performance criteria

In order to carry out research on the campaign issue, you should be able to:

1. Identify gaps in information about issues of relevance to the campaign
2. Identify and agree with the **campaign team** where research is necessary
3. Assess your or your organisation's capacity to conduct and/or commission research
4. Identify the purpose of the research and prepare a realistic **research brief** or work plan, as appropriate, containing time frame and key **objectives**
5. Investigate factors that may be relevant to the campaign such as political, economic, legal or social
6. Analyse the findings of the research using appropriate tools and techniques
7. Build appropriate evidence – positive and negative – including, where appropriate, that from **beneficiaries'** experience
8. Record your findings in an appropriate manner and report objectively in a format suitable for your intended audience
9. Review your campaign **aims** against the findings of your research

Knowledge and understanding

In order to carry out research on the campaign issue, you will need to know and understand the following:

- a) The importance of maintaining objectivity when conducting research
- b) The aims of the campaign
- c) The resources available to conduct or commission research
- d) How to assess the information needs of the campaign
- e) The importance of setting out aims for the research and developing a realistic research brief or work plan
- f) The difference between qualitative and quantitative techniques and the value of each
- g) The difference between primary and secondary research and the value of each
- h) The timeframe for the research and, where appropriate, the priorities
- i) The methods for accessing relevant sources
- j) How to assess the validity of relevant sources and techniques for interrogating them reliably and objectively
- k) Techniques for analysing primary and secondary research and weighing findings, where appropriate
- l) How will the research contribute to or influence the direction of the campaign
- m) The importance of ethical balance when shaping evidence
- n) The audience for the findings of your research, their information needs and the power or influence they have on the issue



Skills

- Basic research skills
- Analysis
- Presentation

Behaviours you need to be able to display

- Ethically
- Honesty
- Thoroughness
- Objectivity
- Adaptability



Develop a campaign strategy

Overview

What are we going to do?

The effectiveness of your campaign will depend on your ability to translate the aims of your campaign into a coherent strategy for action. A good strategy can enable your campaign to succeed.

Your strategy should be informed by a thorough understanding of the target of your campaign, their influence and decision making powers. It is important that the people developing the strategy have a detailed understanding of – or access to authoritative information on – the issue and the wider campaigning environment.

Performance criteria

In order to plan a campaign strategy, you should be able to:

1. Ensure that you are up-to-date with the environment in which your organisation operates and successful campaigning techniques
2. Identify strengths, weaknesses opportunities and threats to the campaign
3. Where appropriate, identify and assess the potential relationship between the campaign and other relevant campaigns, both ongoing and planned
4. Identify areas where compromise may be acceptable
5. Identify and analyse the **target** of the campaign, the extent of their influence and decision-making powers
6. Identify and assess the available routes to influence the campaign **target**
7. Establish campaign **messages** and to whom they are to be communicated
8. Set realistic tactics for the campaign considering **resources** available
9. Identify and assess methods for delivering the campaign
10. Identify how you will know if the campaign is successful
11. Set a timeframe for the campaign based on an assessment of its **aims**
12. Continually review the campaign **strategy** in response to changes to the campaigning issue and in the wider campaigning environment, including other campaigns



Knowledge and understanding

In order to plan a campaign strategy, you will need to know and understand the following:

- a) The wider campaigning environment and the impact this has on your current and future potential campaigning activity
- b) Campaigning techniques and strategies
- c) The target for the campaign, the extent of their decision-making powers and influence
- d) How to influence the target of the campaign, directly and indirectly
- e) How to define campaign aims and identify those that are achievable in the timetable available
- f) Legal and regulatory factors that influence campaign strategy
- g) The campaign message and the methods available for communicating this
- h) Methods for delivering the campaign
- i) How to develop a work plan
- j) The audiences for the campaign message
- k) How to plan for contingencies and the possible risks to the campaign
- l) How to deal with quick wins and/or partial victories and how this effects the strategy
- m) The importance of monitoring and reviewing the campaign strategy
- n) How to identify when the campaign has achieved its objectives

Skills

- Strategic planning
- Tactical awareness
- Risk assessment
- Communication

Behaviours you need to be able to display

- Objectivity
- Persuasiveness
- Innovation
- Creativity



Obtain and manage resources for the campaign

Overview

What resources do we need?

All campaigns draw on resources – money, people, materials, time and services – and these must be secured, at least in part, before a campaign begins.

The amount of resources required during the whole campaign will vary, depending on the scope, duration, ambition and intensity of the campaign, as well as the strategy adopted. The way that resources are deployed will also vary over time, in response to the progress of the campaign and its impact.

In order to obtain the necessary resources for effective delivery of the campaign, support will need to be won from others within the organisation and stakeholders.

Performance criteria

In order to obtain and manage resources for the campaign, you should be able to:

1. Undertake a comprehensive assessment of the **resources** required to achieve the campaign **objectives**
2. Identify the **resources** available to you to deliver the campaign and balance this with the resource requirements
3. Where appropriate, secure commitment from external **supporters** and **stakeholders** to aid the delivery of the campaign
4. Negotiate and procure suitable **resources** from the appropriate source/s
5. Where appropriate, consider with relevant colleagues whether fundraising activities are required to support the campaign
6. Identify the availability of other relevant people and **resources** when assessing what is required
7. Where necessary, commission others to conduct work that is outside your capacity or expertise, or that of the organisation
8. Obtain required support for the campaign within the organisation
9. Champion campaigning and its merits within your organisation to ensure continued support from the **supporter** base



Knowledge and understanding

In order to obtain and manage resources for the campaign you will need to know and understand the following:

- a) The budget for the campaign
- b) How to resource and cost the campaign and the factors to take into account when doing this
- c) The timescales involved in the campaign
- d) The range of resources that the campaign requires including roles and responsibilities
- e) The resources that are available to the campaign
- f) Techniques for procuring funding from appropriate sources
- g) How to obtain the resources needed and, where appropriate, how to modify plans where these are not available
- h) Methods and techniques for assessing your capacity to conduct work and when it is necessary to commission others to do so
- i) The process of commissioning work and techniques for monitoring progress of projects
- j) Those with a stake in the campaign, their motivations and interests
- k) How to identify any requirement for fundraising and how to advise on this
- l) The support and expertise that is available within the organisation and how to obtain this
- m) The place of campaigning within your organisation and methods of championing it that will positively influence others in order to win their support

Skills

- Negotiation
- Case presentation
- Strategic thinking
- Budget setting
- Project management
- Working within a budget

Behaviours you need to be able to display

- Persuasiveness
- Flexibility
- Innovation



Develop a campaign work plan

Overview

What needs to be done?

The campaign work plan should contain a shared understanding of who will do what and when, as well as what resources are available for which activities.

It should be a “living” document, re-visited as required throughout the campaign and flexible enough to accommodate changes in the campaigning environment, both internal and external.

Performance criteria

In order to develop a campaign work plan, you should be able to:

1. Agree the **resources** for the campaign with others within the **campaign team**, and where appropriate, your organisation
2. Identify activities and tactics to deliver the campaign that are within the scope of the agreed budget
3. Set **outputs** for each campaign milestone that are in line with the campaign **strategy**
4. Identify and develop ways to communicate with **beneficiaries** and other **stakeholders** which are accessible and relevant to their needs
5. Establish roles and responsibilities for delivering the campaign and allocate as appropriate
6. Identify tasks that are inter-dependent and the extent to which their completion or otherwise **impacts** on others
7. Assign priorities for the completion of tasks and activities
8. Ensure that an assessment of risks to the campaign is undertaken
9. Maintain your own understanding of the environment in which your organisation operates
10. Where appropriate, review the work plan according to changes in the environment in which your organisation operates
11. Plan for contingencies to ensure the delivery of campaign **objectives**



Knowledge and understanding

In order to develop a campaign work plan, you will need to know and understand the following:

- a) The campaign strategy and its aims
- b) The resources required for delivery of the campaign and any restrictions on their use
- c) The activities that are achievable and the resources that will be required to achieve objectives
- d) The resources available to the campaign
- e) The communication needs of the campaign audience
- f) The timescales for the campaign
- g) What the deliverables will be and the milestones for the campaign
- h) Responsibilities for the completion of campaign tasks and activities
- i) Inter-dependencies between campaign tasks and activities, and the order in which they should be completed
- j) How to keep yourself up to date with issues of relevance to the campaign, such as the environment in which the organisation operates and other parallel campaigns
- k) How to conduct an effective risk assessment
- l) How to ensure continuity and responsiveness in the delivery of the campaign and the importance of doing this

Skills

- Forward planning
- Strategic and tactical thinking
- Project management
- Planning for success

Behaviours you need to be able to display

- Flexibility
- Persuasiveness
- Optimism
- Realism



Design and develop a monitoring and evaluation framework for the campaign

Overview

How will we know we've won?

Before embarking on a campaign it is essential to decide in advance how progress and/or success will be measured. Ongoing monitoring and evaluation allows you to review your campaign and adjust it accordingly. Monitoring progress is also an important way of informing the strategic plans of future campaigns.

It is good practice to decide at an early stage how the campaign will be evaluated as this process will help to structure the campaign

Performance criteria

In order to design and develop a monitoring and evaluation framework for the campaign, you should be able to:

1. Agree with relevant colleagues a starting point in order to be able to measure progress towards campaign **objectives**
2. Ensure the appropriate **resources** are available to evaluate the campaign
3. Decide what indicators and methods will help you measure the progress of the campaign
4. Establish a shared understanding of what success means
5. Set up systems to **monitor** the campaign, gathering data and any supporting information as appropriate
6. Establish a timeline for **monitoring** the campaign
7. Decide when **monitoring** and/or progress reports should take place and record as appropriate
8. Define the contribution of **campaign team** members to the **evaluation** process
9. Establish methods and techniques for analysing and reporting **evaluation** findings
10. Ensure procedures are in place to review the findings of the **evaluation** and act on recommendations



Knowledge and understanding

In order to design and develop a monitoring and evaluation framework for the campaign, you will need to know and understand the following:

- a) The resources available for monitoring and evaluation
- b) What the campaign wants to achieve and the campaign vision
- c) Methods and their respective advantages and disadvantages for measuring campaign progress
- d) The timescales of the campaign, milestones, activities and outputs
- e) Ways of establishing appropriate processes and procedures for monitoring the campaign
- f) The internal roles and responsibilities in the evaluation process
- g) Methods and techniques of data analysis
- h) The reporting requirements of your organisation and to whom to report evaluation findings

Skills

- Critical analysis
- Problem solving
- Planning
- Organisation

Behaviours you need to be able to display

- Thoroughness
- Pragmatism
- Objectivity
- A sense of proportion



Build the campaign identity and maintain its reputation

Overview

What do we want to say?

This unit is about the key aspects to consider when shaping the campaign's identity and maintaining its profile – both within the organisation and to the target audience.

This is particularly important, as a powerful identity can be extremely helpful in achieving your campaign objectives. It is also important to maintain the reputation of the campaign by remaining committed to the needs of beneficiaries and the campaign objectives. It involves considering the right approach to take when communicating campaign messages and ensuring this will be attractive to your intended audience.

The brand, or identity, of the campaign will be developed as relevant to the campaign, as might be distinctive from the identity of the organisation – in this case it is important that the two do not become confused.

The message must be targeted appropriately to reach the right people with the right messages.



Performance criteria

In order to build the campaign identity and maintain its reputation, you should be able to:

1. Establish the identity of the campaign and the key **messages** to be communicated
2. Involve **beneficiaries** and other **stakeholders**, as appropriate, to develop the **messages** communicated about the campaign
3. Develop a **strategy** for communicating **messages** about the campaign
4. Develop and implement campaign tools for communicating campaign **messages**
5. Ensure that, where they differ, the brand of the organisation and the brand of the campaign remain distinctive
6. Ensure all information distributed about the campaign is accurate and well-presented to maintain the credibility of the campaign and the organisation
7. Coordinate responses to consultations and enquiries, including from the media, within appropriate timescales
8. Coordinate **monitoring** of any media coverage, remaining ready to respond to publicity and to keep public attention focused

Knowledge and understanding

In order to build the campaign identity and maintain its reputation, you will need to know and understand the following:

- a) The importance of accuracy when developing campaign messages
- b) The importance of clarity of language and the communication needs of your varying audiences
- c) The campaign vision and its objectives
- d) How to develop coherent and consistent communication messages
- e) The information to be communicated about the campaign
- f) Others who have a stake in the campaign and methods of involving them
- g) The audience for the campaign
- h) Communication techniques appropriate to different audiences
- i) The information needs of the campaign and how to identify appropriate campaign tools such as briefings and reports
- j) How to check that the messages you are communicating are accurate and sympathetic to the varying audiences
- k) How to deal with information requests from others within the organisation and externally about the campaign
- l) The importance of monitoring media for coverage of the campaign
- m) The arguments opposing your campaign
- n) How to deal with negative publicity and misinformation about the campaign



Skills

- Interpersonal
- Teamworking
- Encouragement
- Motivating others
- Leadership

Behaviours you need to be able to display

- Approachability
- Enthusiasm
- Passion
- Innovation
- Patience



Maintain relationships integral to the campaign

Overview

What needs to be done to keep people on side?

An objective of many campaigns is to win enough support to build a consensus – in order to change public perceptions, everyday behaviour, or the law. In some cases it might be about preserving a situation, or a status quo.

This requires high levels of interpersonal skills, such as the ability to nurture contacts – usually strangers, often busy people who have little spare time – and to develop your relationship with them for the good of the campaign.

Equally important are your relationships with the campaign team – both paid and unpaid members – and with contacts in other bodies which form part of any campaign coalition.

Maintaining productive working relationships at all levels is therefore fundamental to the success of a campaign.



Performance criteria

In order to maintain relationships integral to the campaign, you should be able to:

1. Identify potential allies, **supporters** and opponents of your campaign
2. Assess the level and extent of power of potential allies, **supporters** and opponents and their links to, or influence on, campaign **targets**
3. Identify opportunities to engage with others with the aim of winning their support
4. Take advantage of opportunities to engage with potential allies and **supporters** and proactively seek their involvement
5. Network with **stakeholders** to maintain their interest and loyalty to the campaign
6. Keep relevant others informed of campaign progress, events and **outputs**
7. Draw on the skills and expertise of others such as the **campaign team, stakeholders** and **beneficiaries** in delivering the campaign
8. Ensure that your actions and behaviour at all times when dealing with others encourages openness, fairness and cooperation
9. Deal with grievances and manage conflicts of interest in the **campaign team**

Knowledge and understanding

In order to maintain relationships integral to the campaign, you will need to know and understand the following:

- a) The campaign vision and **strategy**
- b) The environment in which your organisation operates
- c) Who are your potential allies, supporters and opponents and assess |their influence on the campaign target
- d) What are the opportunities to engage with others and use these to your advantage
- e) Methods and techniques for engaging with others at all levels in order to win support without compromising your campaign objectives
- f) The beneficiaries of the organisation, their needs and characteristics and how they can help the campaign
- g) Existing supporter groups for involvement in the campaign
- h) The networking opportunities to maximise exposure of the campaign
- i) The importance of maintaining productive working relationships
- j) How to deal with grievances and manage conflicts of interest in the campaign team
- k) Why it is important to maintain relationships with beneficiaries and supporters when the campaign ends



Skills

- Engaging allies
- Negotiation
- Identifying and exploiting networks
- Interpersonal
- Motivating others
- Managing 'complex' relationships

Behaviours you need to be able to display

- Patience
- Approachability
- Resilience
- Self-motivation
- Persuasiveness



Administer and organise the campaign

Overview

How do we deliver?

Integral to the smooth running of the campaign is the tight management of activities in order to meet planned objectives and milestone. It is about being highly organised and efficient at running the campaign including making sure that comprehensive and accurate records are maintained. Good organisational skills are crucial because the efficient delivery of activities in the campaign is essential to reaching its overall aim.

Performance criteria

In order to administer and organise the campaign, you should be able to:

1. Keep abreast of policy and other factors which will **impact** on the campaign
2. Ensure that arrangements for campaign activities such as events, seminars and meetings are carried out according to specific **objectives**
3. Support campaign events and activities by providing assistance to the campaign to ensure **objectives** and milestones are met
4. Deal with campaign enquiries by directing queries to the **campaign team** as appropriate
5. Ensure correspondence, internal briefings and copy such as newsletters and website text are made available to others
6. In accordance with legal requirements, maintain campaign records and contacts, including details of correspondence
7. Contribute to **monitoring** the campaign by measuring progress according to the **evaluation** framework
8. Ensure that all progress towards campaign goals is recorded appropriately, including partial achievement



Knowledge and understanding

In order to administer and organise the campaign, you will need to know and understand the following:

- a) The administrative needs of the campaign
- b) Organisational procedures for event organisation, including budgets and any existing arrangements with suppliers
- c) Lines of reporting in the campaign team, roles and responsibilities
- d) The information needs of the campaign and the campaign team
- e) The work plan for the campaign and its timescales
- f) The key events and milestones for the campaign
- g) How to maintain accurate and up to date records
- h) The importance of maintaining confidentiality, where appropriate
- i) The legal requirements regarding record keeping, such as for data protection and freedom of information

Skills

- Organisation
- Event management
- Interpersonal
- Teamworking
- Working to and managing deadlines
- Project management
- Leadership

Behaviours you need to be able to display

- Thoroughness
- Pragmatism
- Flexibility



Mobilise the campaign team

Overview

What skills do we need?

This unit covers the staffing considerations you may need to take into account prior to your campaign's launch and during the life of the campaign; these people might be paid or unpaid.

The capability of the campaign team will have a marked impact on the success of the campaign; therefore the team must have the required knowledge, training and support in order to be effective.

Performance criteria

In order to mobilise the campaign team, you should be able to:

1. Identify the people requirements of the campaign including for events and other specific activities
2. Select and, where necessary, recruit the **campaign team** based on the skills and knowledge to deliver the campaign
3. Brief the **campaign team** on the campaign details and ensure they are aware of the campaign vision
4. Brief and provide any necessary training and/or information to the wider campaign **supporter** base
5. Involve volunteer workers and other **supporters** in the delivery of the campaign
6. Provide support to the **campaign team** by answering queries and providing advice, where necessary
7. Build positive relationships with and among the **campaign team**
8. Encourage and motivate the campaign team, including volunteer workers, to deliver the campaign **objectives**



Knowledge and understanding

In order to mobilise the campaign team, you will need to know and understand the following:

- a) The campaign vision and work plan
- b) The resources for the campaign both financial and non-financial
- c) The support needed to deliver the campaign such as skills and labour
- d) Methods and techniques for selecting and involving the campaign team (paid and unpaid)
- e) The information that the campaign team needs in order to deliver the campaign effectively
- f) How to manage the campaign team including the different needs of paid and unpaid people and your obligations to them
- g) The training needs of the campaigning team and support base
- h) Methods of involving and motivating campaigners

Skills

- Motivating others
- Communication
- Team leadership
- Project management

Behaviours you need to be able to display

- Approachability
- Objectivity
- Supportiveness
- Self-motivation



Coordinate materials and products for the campaign

Overview

How do we get our message across?

This unit is about the tactics used to deliver the campaign messages. Materials and products include printed matter, such as leaflets and information packs, electronic media such as dedicated websites, e-mail bulletins, and others such as petitions, banners, adverts, costumes, badges, stickers or free gifts.

The design and production of materials can be costly, and making a big impact with limited means may require some imagination when deciding which resources to deploy.

Performance criteria

In order to coordinate materials and products for the campaign, you should be able to:

1. Be fully aware of the key **messages** to be communicated by the campaign
2. Have access to and be able to articulate the campaign **strategy**
3. Identify the range of different materials and products available to the campaign and take into account important factors such as budget, skills and time
4. Assess the suitability and **impact** of the different materials and products for the campaign **strategy**
5. Establish any accessibility issues or requirements of the intended audience
6. Select materials and products which are most appropriate to the **messages** to be communicated and the intended audience, taking into account cost-benefits
7. Establish the purpose of materials and products for the campaign
8. Assess the organisation's ability to provide the required materials and products for the campaign
9. Where appropriate, engage individuals and/or other organisations with appropriate expertise to produce materials and products
10. Contribute to and **monitor** the development of materials and products
11. Ensure that all materials and products are available when required and used in accordance with the campaign **strategy** and work plan



Knowledge and understanding

In order to coordinate materials and products for the campaign, you will need to know and understand the following:

- a) The campaign strategy
- b) The audience for materials and products
- c) The resources available to the campaign
- d) The identity of the campaign, its aim and objectives
- e) Key events in the campaign calendar
- f) The purpose of the materials and products to be developed and their intended audience
- g) The factors to take into consideration when selecting the most appropriate materials and products for the campaign
- h) The resources required to develop materials and products for the campaign
- i) The information and access needs of all of your audiences
- j) The materials and products that will engage your intended audience
- k) The time it will take for any materials to be designed, written, printed and/or manufactured
- l) Your role in the production and development process
- m) The capacity of the organisation to develop and produce materials and products

Skills

- Decision making
- Product procurement
- Organisation
- Writing
- Project management
- Time management

Behaviours you need to be able to display

- Innovation
- Creativity



Monitor the campaign

Overview

How are we doing?

Resources – such as money, people, materials, time and services – available to deliver a campaign are often dynamic in that they can grow or shrink as new funds are found or the demands change. Balancing such fluid resources can be challenging and require constant reappraisal of priorities and deliverables.

Monitoring a campaign is a crucial part of delivering a campaign as it contributes to its direction and how resources are allocated as needs change, funds shrink or new funds are found.

Monitoring involves keeping a finger on the pulse of everything that's going on in the campaign, reporting progress honestly and learning lessons. This is important because circumstances might arise during a campaign that make it unwinnable – it is important to identify and react appropriately to these kinds of changes.



Performance criteria

In order to monitor the campaign, you should be able to:

1. Ensure that you an appropriate level of access to all relevant information to enable efficient **monitoring** of the campaign
2. Maintain an understanding of the external campaigning environment
3. Update information on identified risks at regular intervals and escalate as appropriate
4. Ensure that resource levels are checked regularly and recorded in line with organisational procedures
5. Ensure that contingency **resources** are available and maintained in case of issues or unintended or unforeseen problems
6. Make **resources** available to the **campaign team** according to the work plan
7. Ensure **resources** are used in accordance with the campaign **objectives**
8. Produce **monitoring** and/or progress reports in line with the work plan
9. Honestly and objectively report performance to relevant **stakeholders**
10. Identify where improvements can be made in the delivery of the campaign

Knowledge and understanding

In order to monitor the campaign, you will need to know and understand the following:

- a) The campaign strategy and work plan
- b) The environment in which the organisation operates and the campaign issue
- c) The resources required and available to deliver the campaign
- d) Those who have a stake in the budget and responsibility for its use and monitoring
- e) The importance of setting resources aside as a contingency in order to ensure the continuity of the campaign
- f) The organisation's processes and procedures for making resources available to the campaign team
- g) How to check resource levels including methods and procedures for recording them
- h) How to deal with a shortfall in resources
- i) The implications of running over budget
- j) The reporting requirements for communicating campaign performance
- k) The importance of honesty and objectivity in reporting



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Skills

- Numeracy
- Budgetary control
- Reporting
- Communication
- Accountability

Behaviours you need to be able to display

- Realism
- Practicality
- Pragmatism
- Thoroughness
- Impartiality



Evaluate the campaign

Overview

Did we achieve success and how can we learn from it?

This unit is about collecting and analysing information that will enable you to conduct an evaluation of the campaign. The effectiveness of different types of campaign will be evaluated in different ways depending on the tactics employed and the scale of the campaign, for example.

Evaluation is important because it should inform the way that future campaigns are developed – which build on successes and learn from past problems or mistakes. Evaluation doesn't have to be conducted at the end of the campaign, but can be conducted at certain points or stages as a formative evaluation.

In some circumstances, results will be visible and clear; in others, they will not and a long term evaluation through further enquiry, such as surveys, or longer-term analysis is required.



Performance criteria

In order to evaluate the campaign, you should be able to:

1. Ensure there is sufficient time available in the work plan and set aside to conduct an **evaluation**
2. Refer to the **evaluation** framework to identify the starting point and the reference point against which performance will be measured
3. Ensure information about progress is obtained using appropriate techniques and recorded at designated intervals or milestones
4. Record in a suitable format key **outcomes** and **outputs** to inform the **evaluation**
5. Identify and assess the **impact** of other, external influencing factors such as other campaigns
6. Using appropriate techniques, analyse the information collected
7. Review the analysis to determine progress towards campaign **objectives** and/or level of success
8. Review specifically the **impact** of the campaign including, where appropriate, on **beneficiaries**
9. Report to **stakeholders**, including **beneficiaries**, where appropriate, the **evaluation** findings
10. Use the findings of the **evaluation** to plan next steps and inform future campaign activities, identifying successes and lessons learned

Knowledge and understanding

In order to evaluate the campaign, you will need to know and understand the following:

- a) The objectives of the campaign and its vision
- b) The intended outcomes of the campaign and the key beneficiaries
- c) The evaluation plan, its aims, objectives and target audiences
- d) How the organisation and campaign team defines progress and/or success
- e) How to identify and monitor progress by identifying a desired campaign outcome
- f) How to involve beneficiaries appropriately in an evaluation
- g) The means by which campaign effectiveness is measured using, for example, a starting point and reference points to measure progress and success
- h) The key stakeholders in the campaign
- i) Other campaigns, concurrent or previous, "friendly" or "hostile" which may impact on the campaign
- j) Methods and techniques for analysing quantitative and qualitative information
- k) How to interpret the analysis to identify progress made towards campaign objectives
- l) Methods of reporting your findings to those to whom you are accountable
- m) The importance of learning lessons from current or previous campaigns to inform the campaign, or future campaign activities



Skills

- Analysis
- Critical analysis
- Interpretation
- Organisation
- Planning
- Attention to detail
- Research
- Communication
- Record keeping

Behaviours you need to be able to display

- Objectivity
- Pragmatism
- Prudence
- Realism
- Integrity
- Supportiveness
- Thoroughness



Glossary of terms

Aims

Long term goals for the future that the campaign will work towards.

Beneficiaries

Anyone – or anything – that may benefit from the campaign taking place and/or its positive outcome.

Campaign team

The people responsible for delivering a campaign. This will vary from campaign to campaign and from organisation to organisation, depending on the strategy and tactics employed, and the scale of the campaign. The campaign team can include people at a variety of levels, including paid staff and volunteers; where a coalition is formed it can comprise individuals from more than one organisation.

Coalition

The alliance of a number of organisations and/or individuals with a common interest. The alliance is usually a temporary arrangement and will exist for the delivery of a joint campaign.

Decision maker

The person or persons responsible for making decisions about the campaign. The decision-making process can vary according to each organisation and campaign; for some it will be very formal and involve a hierarchy, for others will involve an informal chat or discussion.

Evaluation

Measuring the campaign (usually at the end) to see if it achieved its aims and made a difference.

Impact

A marked effect or influence perhaps as a result of the campaign or as a result of the activities undertaken as part of the campaign.

Message/s

The key pieces of information communicated by the campaign to an identified audience in order to win support.

Monitor

Observing and checking the campaign progress over a period of time

Objectives

Shorter term desired outcomes that collectively add up to the longer term aims of the campaign.

Outcome

A consequence of the campaign or activities undertaken for the campaign.

Outputs

The process of producing something for example a product of a project or campaign, perhaps a report or something less tangible.

Research brief

The requirement of the research; also referred to as a specification outlining the aim and objectives of the research and any other relevant information that will impact on the approach taken.

Resources

A generic term covering anything which is used to support your work, including: physical (premises, equipment, consumables); energy; human (whether paid or unpaid, internal or external); information.

Supporters

Those who support your organisation through contributions of time, funds, gifts in kind or membership support.

Stakeholders

A person or organisation that has a legitimate interest in an organisation or issue.

Stakeholders in the voluntary and community sector may include: trustees or directors; employees; volunteers; coalition organisations; beneficiaries; funders; subscribers; donors; members of the public; politicians; government bodies; regulatory bodies; media.

Strategy

A broad course of action with an identifiable outcome. This is achieved through a sequence of steps, which are subject to monitoring and modification, to accomplish desired aims and objectives.

Target/s

The person/s or organisation/s at which the campaign is aimed. The target is the decision-maker with the power or influence to create the outcome that the campaign is seeking to achieve.

In this context, the 'target' is not intended to mean the desired outcome of the campaign.

Values

The things that the organisation considers desirable and valuable. Making values explicit can help guide people's decisions and actions in an organisational context.

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