



CONSERVATIVE PARTY REVIEW 2016



Conservatives

Review of the Party Organisation

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Foreword

I am delighted to present this final report on the recommendations of the Party Review Panel established following the 2015 General Election.

The Conservative Party is the oldest, most successful political party in Britain, if not the world. It has sustained this success by moving with the times, adapting to the changing face of Britain over the centuries, and ensuring it is able to deliver electoral successes.

In 2015 we won an historic election – the first delivering a Conservative majority Government since 1992. In the past, the only two other such reviews of the Party – in 1947 and 1998 – have taken place following defeats at the ballot box. To do so now, in a position of strength, is a unique opportunity.

Like many political parties across the West, we need to answer the question of how we thrive and grow in the twenty-first century.

The facts, however, should give us hope and incentive for change. Over recent years we have seen a staggering number of people engaging with the Party through social media and other platforms. These people are not all Party Members, but they care enough to make a connection. If we want to thrive in future years, we must recognise this change and harness these new supporters.

With this objective in mind, we established this Review by appointing a Panel to look at how the Party works and to ensure it is in the best possible shape to win elections, whether local or nationwide, for years to come.

The Panel was composed of representatives from all areas of the Party: volunteers, councillors, MPs, MEPs and peers. Meetings for Party Members have taken place across the country, more than 60,000 people took part in an online survey and thousands of submissions have been made to the panel.

I am very grateful to my fellow Panel members for all of their hard work in this process. They have each brought a huge amount of wisdom and expertise to our work. Likewise, we are very thankful to all those who attended our meetings, took part in our survey or took the time to let us know their thoughts.

I hope this document provides a comprehensive account of the Review and the Panel's recommendations.



The Rt. Hon. the Lord Feldman of Elstree
Chairman of the Conservative Party

Review of the Party Organisation

The Panel

The Rt Hon the Lord Feldman of Elstree, Party Chairman in the Chair

The Rt Hon Rob Halfon MP, Party Deputy Chairman

The Lord Gilbert of Panteg, former Party Deputy Chairman

Cllr Philip Atkins, Leader of Staffordshire County Council

Richard Harrington MP, Member of Parliament for Watford

Lyndon Jones MBE, former Chairman of the Welsh Conservative Party

Syed Kamall MEP, Member of the European Parliament for London

Caroline Kerswell, former PPC for Wigan

John Lamont MSP for Ettrick, Roxburgh and Berwickshire

Adrian Mitchell MBE, former Regional Chairman in the North West

The Baroness Pidding CBE, Former Chairman of the National Convention

The Baroness Scott of Bybrook OBE, Leader of Wiltshire Council

Chloe Smith MP, Member of Parliament for Norwich North

The Lord Smith of Hindhead CBE, Chief Executive of the Association of Conservative Clubs

Debbie Toon, Regional Chairman in Yorkshire and the Humber

Ian Sanderson, Head of the Voluntary Party (Secretary to the Panel)

Introduction

The review of the Party organisation was launched by the Party Chairman Lord Feldman immediately after the General Election in May. It is the first time that a review has been held against a backdrop of electoral success and recognises that it is important that the General Election result in May should not mask those areas where the Party may be declining in strength or underperforming.

25 formal consultation meetings attended by Panel members have been held in England, Wales and Northern Ireland and dozens of local meetings at constituency and branch level have been held, attended by several thousand activists overall. The online survey of Members, former Members and supporters has received more than 60,000 responses and there have been more than 200 written representations from Members, running into thousands of pages.

Contributors to the discussion do not necessarily share the same views or even agree on the best route to attain the Party's goals but there is a total commitment to the objective that the Party on the ground exists to fight and win elections and to promote the Conservative cause at every level of government.

The Review Panel is determined that the review should be to the benefit of all seats: strong Conservative, strong opposition and marginal alike.

One strong message that has come from the process is that whilst everyone accepts that any election victory relies upon a determined focus on target seats, this should not be the beginning and end of the Party organisation and its objectives.

This report sets out to record the key points that have emerged from the consultation. The Panel decided to concentrate on three areas of particular importance:

- Membership
- Structure of the Party organisation across the country and use of resources
- Candidate selection

Party Members were invited to comment on any aspect of the Party organisation they felt needed attention and this report includes any themes that received significant comment during the consultation. The opportunity to meet and discuss our organisation has been widely welcomed by those attending meetings and responding to surveys.

1. Membership

Background

Membership of the Party has been in gradual decline over the last 30 years. This has been a common experience across many organisations and political parties.

New subscriptions are collected both locally and through the Party website nationally. Renewals are only collected locally unless an Association has opted into “CAMS” whose role has primarily been the recovery of lapsed Members.

A capitation fee of £5 is currently levied for all Members of the Party apart from young Members (under 23) and members of the Armed Forces. These Members pay a reduced fee of £5 and £15 respectively. There is no fixed subscription and Associations are free to set this at any level they wish. There is a recommended minimum of £25 per head advised by the Membership Committee.

A key function of the consultation has been to discuss why people do or do not join the Party and to gain feedback on the overall membership experience with a view to improving it and boosting both retention and recruitment. The online survey of Members, former Members and supporters has provided some valuable data.

A. Response from Members

General feedback on membership

The survey revealed that only 7% of our Members were dissatisfied with their experience. This should not be a cause for complacency.

The greatest motivator for joining was simply to support Conservative principles and make the country a better place.

A general theme was that the Party does not tend to talk enough about values or use these to encourage membership. A number of contributors made similar points that “*we need to excite people*”.

Some Members tend to feel that they are not given enough opportunity to participate in the politics of the Party.

Many contributors at the meetings expressed a view that Associations could be more representative of Conservative voters generally, though others suggested it may be more accurate to say that the “*passive*” membership is more representative than the more highly motivated activists.

It is felt that people are less inclined to be “*joiners*” than in the past and this is something that is repeatedly stated though it is not entirely borne out in other large membership organisations such as The National Trust.

It was felt by some contributors that the right to elect the Party Leader, and candidates at all levels of government, is not emphasised enough. It has been suggested that we should be promoting this now.

When people are asked what they expect from their membership the views are split. Some people simply say that they join because they want a Conservative Government and that if they get one then they feel their subscription was worthwhile in itself.

It has been pointed out by many Members that single issues are key motivators to joining a campaigning organisation and that the Party should do more to highlight these. Improved membership would then follow as a natural progression.

It was suggested that more thought should be given to the differentiation between Members and activists as their motivation is different.

There has been some discussion about the age of Members. All age groups are important but there are certain segments that are more likely to be in a position to join if targeted.

The over 50s are a group where people may have more available time, be more established in their careers or even contemplating early retirement so they should be a target audience for recruitment. The 30-50 age group contains plenty of supporters but these are arguably the people with most commitments so the concept of membership and involvement needs to be made as non-onerous as possible.

“Friends” and supporters

The General Election demonstrated that there are significant numbers of people who are happy to campaign for us without joining. There are mixed views about whether there should be a special category for these supporters.

Some Members feel that a designation of “*Friends*” being asked to pay some form of subscription is worthwhile. However, it has also been suggested that having a formal public designation of supporters is unnecessary in that all that is required is to maintain an accurate database of supporters who can be kept informed and contacted for help, attendance at events or donations when appropriate. The argument runs that if they are not “*joiners*” then they are unlikely to be concerned about having any formal description and it could even be off-putting to them.

CAMS

Views on the success of “CAMS” are not unanimous but are generally positive. There is an acknowledgement that it has succeeded in retrieving a significant number of lapsed Members (over 10,000) though there is some criticism over the communication of responses. Associations seem to have struggled to obtain timely information as to who has re-joined though there do not seem to have been problems receiving the money itself. As a principle it has much support and some Associations have availed themselves of CAMS to renew their Members.

Incentives and services to Members

The question of regular communications (either hard copy or electronic), or affinity schemes has featured at most meetings. They are generally regarded as a positive without a downside though few regard them as a major driver of either recruitment or retention. The online survey indicated that more opportunity to take part in political discussion and some form of newsletter would be regarded favourably and certainly the request for more policy engagement was a regular feature of the meetings.

It has been identified that there is a strong need for some form of a standard welcome pack that tells Members about the Party and in particular about the different ways of getting further involved. Currently these are produced, or not as the case may be, by Associations locally and there is no consistency across the country.

In terms of encouraging involvement from Members it is felt that there should be more effort to discover the skills that Members may have to offer.

Subscription level

The online survey found that generally Members were happy with £25 and that a significant proportion would pay more. This is a reflection of what is already happening because many Members do pay above the recommended minimum. The activists tend to be divided on the subject of subscription levels, and it is probably in part because they personally invest considerably more than their subscription in the Party that some favour a lower subscription. Some active Members suggest we should maintain a system of no minimum subscription so that we would never be pricing a would-be Member out of the market.

Older Members

There have been a number of submissions suggesting that there should be a reduced subscription for over 65s though some Members have pointed out that many people in this age group have more disposable income than younger Members and the result of this might be to reduce the amount that is currently given willingly. There is little evidence that the subscription level is deterring older people.

Family membership

It has been suggested that some form of family membership should be introduced in order to encourage younger Members and also a return to joint couple memberships. After the reorganisation of 1998, there was a joint membership rate for couples but this was removed on the basis that it could be seen as discriminating against single Members who were proportionately paying a higher subscription for their membership rights. There has not been significant demand for this but it has been pointed out that at £25 per head, it could be discouraging for couples to join.

Central administration of membership

There is a clear majority of activists who now recognise that the administration of small numbers of Members on a constituency basis is inefficient. Few other national organisations would run membership in this manner. The fact that the establishment of an accurate national database of our Members is dependent on the varying skills of literally hundreds of people means that it is virtually impossible to run ballots and maintain communication with Members nationally.

The number of complaints from Members in Associations relating to the local administration of their membership details would suggest that many local offices are struggling to maintain their own information. The support for central administration of membership as a principle is overwhelming from the consultation process with certain significant caveats:

- It must be a properly resourced and demonstrably efficient system. There is no point in exchanging one inefficient process for another.
- There must be a transparent system that returns a sum of money per Member (after deduction of a capitation fee) back to the Association that reflects the amount given.
- There should still be local recruitment of Members
- Associations should still have the power to accept or reject the membership of an individual.

The need for a capitation fee is generally accepted and clearly there is a cost associated with the collection of subscriptions that would provide a saving if handled centrally. However, many Associations have derived considerable income from subscriptions that have been well in excess of £25 per person. Any attempt to impose a maximum return per Member in terms of the sum repaid to the Association would be widely resisted.

A new dimension that could be offered to Members that has attracted strong support would be an exclusive Members' area on the website and the opportunity to take part in regular online surveys, access affinity deals and so on. The Members' area could also provide a facility for Members to correct and update their own details.

Opposition to central administration of membership

There are opponents to centralisation of membership whose reasons, in addition to a feeling that the above conditions may not be adhered to, include a fear that centralisation will break the connection between Members and their local Association and branches. Others counter this by saying that this could not be said to apply in the majority of constituencies where branches have long since ceased to exist.

There are those who feel that the decline in membership began or at least was greatly accelerated when the collection of subscriptions was centralised to the local office rather than left to branches to conduct. This view is generally regarded as rather too *"rosy"* in 2015 and indeed the introduction some 30 years ago of locally collected subscriptions by direct mail from Association offices rather than the doorstep was due even then to the demise of branches and the inability of many to collect subscriptions on a timely annual basis.

A common theme throughout the review is that there should not be a *"one size fits all"* approach to any of the issues raised. In the case of membership the argument is that *"successful"* Associations should be exempt from nationally-run membership. The opponents of centralisation are often in this category and in particular they are in the minority of Associations where there is still a healthy branch structure and where they argue that Party loyalty adheres primarily to branch or Association.

CCHQ would need to demonstrate that it can deliver a complicated IT project in a timely manner.

There is also an argument that it may create the redundancy of some part-time staff who are employed to run membership. This is countered by others who would argue that too many staff are employed simply to process membership subscriptions and that the income from those subscriptions is largely used to pay those same staff creating an unproductive circle. Some have suggested that where these staff have other skills they could be deployed more usefully in other aspects of the work of the Association. For example they could be communicating with Members, welcoming them, finding out whether they would like to become involved and generally having an easier relationship than having to ask them for money.

Those who oppose centralisation nevertheless expect that an accurate central database of Members should be maintained, though no solution has been successfully presented as to how this can be delivered using the current system.

B. Response from the Panel

The decline in party memberships is not a new development and nor is it confined solely to the Conservative Party.

Membership of the Conservatives, Labour and the Liberal Democrats is below the levels of 30 years ago. In 2015 1% of the electorate was a member of these three parties compared to 3.8% in 1983.¹ In recent years, the number of Party Members has remained static at around 150,000.

The reasons for this are several fold. Firstly the social dimension to Party membership, involving attending events and meeting like-minded people, is not as important to our Members as it once was. Secondly the benefits of membership are not being clearly articulated, and in some cases the benefits fall short of expectations.

Thirdly the quality of membership administration between Associations varies considerably; this is supported by the fact that there are over 200,000 lapsed Members on our VoteSource records, and the online survey found that 44% of former Members had not heard from their Association or been asked to renew.

Fourthly, the huge expansion in digital and social media over the last decade or so has shown a clear move away from the bricks and mortar of membership to digital offers. David Cameron has over 1.3 million followers on Twitter and nearly 1 million likes on Facebook. The Party itself has almost 200,000 followers on Twitter and well over half a million likes on Facebook. The database of email subscribers is over 1.5 million.

Finally there seems to be a general desire amongst Members for a greater say on Party policy. In response to the question in our online survey '*What could the Party do to get you more involved?*' the top answer amongst Members was more policy discussions (31%). Similarly, 38% of former Members said this would make them more likely to re-join the Party.

Clearly more can be done to attract new Members to join the Party and encourage current Members to renew their membership.

The Panel recognises that Conservative Clubs could be an appropriate recruiting ground for the Party to increase its membership, as they have in the region of 400,000 members.

Central administration of membership

The administration of Party Membership has, historically, been the responsibility of individual Associations. It has been up to each Association to process new memberships and handle renewals. For Association Officers and volunteers, this can consume a large amount of the time or resources they are able to dedicate to their Association.

The Panel notes the overwhelming feeling of Members in the consultation that it is not efficient to have a membership administration system that depends upon hundreds of different operations at a local level. Few other national organisations would run their membership in such a way, and although there are examples of Associations who run their processes meticulously, there are many more who struggle with this responsibility.

The creation of a centralised membership system received widespread support in the consultation.

Whilst some contributors have suggested that so long as there is a central database, Associations should be free to run their own membership administration, the Panel feels that the integrity of that database would only be as accurate as the input and updating from hundreds of local sources.

¹ *Membership of UK Political Parties*, House of Commons Library Briefing Paper, Number SN05125, 11 August 2015

Recent attempts to run membership ballots have shown difficulties that have been in part (though not entirely) due to the difficulty of maintaining responsibility for a central database at the same time as relying upon updating data to be achieved locally.

A simple solution to this would be to centralise the entire administration of Party membership to CCHQ. The nature and essence of Party membership will remain unchanged. Members will still be part of their Associations, and only the administration of their membership will be handled by CCHQ to reduce the bureaucratic burden on Associations.

This system would be run by full-time professionals tasked with handling the recording of new Members, renewals of existing Members and looking at ways to drive up membership numbers across the country.

This team would include:

- 1 x Director of Membership
- 1 x Membership Manager
- 2 x Membership Administrators

This revamped Membership Department, staffed by professionals with expertise in this area, would be tasked with undertaking significant marketing work to attract new Members and to encourage renewals. Associations will no longer have to bear the costs of renewing Members and providing membership cards.

The staff within the Membership Department will be dedicated to running membership and will not have other responsibilities. It would be the responsibility of this Membership Department to:

- Market Party membership and clearly define the benefits of being a Member
- Handle membership renewals and process new Members
- Design and publish Members-only digital content
- Engage with Party Members to refine, develop and enhance Party membership.

Party membership currently costs £25, of which the Party receives £5 through the Per Member Levy (PML), i.e. 20% of the membership fee. To finance this new Membership Department, a further £5 would be levied on the Membership fee. The revised PML of £10 would therefore account for 40% of the fee with the balance being paid to the Association automatically.

CCHQ currently receives around £700,000 from Associations. Of this, £550,000 is used to cover the deficit of the Conservative Agents Superannuation Fund, which CCHQ has taken on from Associations.

In exchange for the increase in the PML, all charges currently billed to Associations by CCHQ will be abolished. This includes VoteSource and election insurance payments.

For example, on an annual basis an Association with 200 Members would raise £5,000 in membership subscriptions (assuming each Member pays no more than the minimum of £25). Under the current system, this Association would pay £1,000 in PML, and approximately £700 in VoteSource charges and £180 for election insurance. This Association would therefore pay a total of £1,880 to CCHQ on an annual basis.

Under these proposals, this Association would pay £2,000 in PML and no other costs; this represents a net increase of only £120 (6%). The Association would also see its costs reduced as it is relieved of the financial burden of administering membership, namely staffing costs and postage for renewal letters, and it will gain the financial benefits of a higher retention rate. The Association would expect revenues to increase further due to proposals for tiered membership outlined below.

The Panel believes that this arrangement would provide significantly better value for money for Associations.

The Membership Department would be funded by the PML, and Associations would reap the benefits through increased membership and higher retention rates for existing Members. There would also be the resources to invest in either direct mail or digital campaigns to recruit new Members.

Associations would still be responsible for local recruitment, however the burden of administering membership records will be carried by the Membership Department in CCHQ rather than by local Associations.

A number of Members have noted that, though supportive of the proposal to create the Membership Department, they would wish for the renewal letters to be sent in the name of their Association or Association Officers. The Panel is content to accept this request and recommends that Associations should be offered the option for their renewal letters to be sent in the name of their Association should they request it.

The Panel noted the criticism of VoteSource during the review process and appreciates the concerns raised. The membership function of VoteSource was released very close to the General Election and there were a number of bugs in the software. Insufficient training was provided and this clearly needs to be resolved.

A great deal of work has gone into refining the software over the last few months and the Membership function now works well. Under this new centralised system it would be a central function of the Membership Department to provide the necessary training programmes and guides to Associations to allow them to utilise this aspect of VoteSource.

To ensure that the transition to centralised administration of membership would occur timely and smoothly, it was suggested that the roll out should take place on a region by region basis.

The Panel is conscious of the need to secure the healthy cash flow of Associations, and therefore recommends that arrangements are made for monthly electronic transfers of membership subscriptions (less the PML) to Associations.

Improving offer to Members

The Panel has considered the numerous contributions relating to membership including those from the online survey. The Panel believes that in order to increase membership levels the Party needs to offer more to its Members.

The online survey suggests an overall high level of satisfaction on the part of existing Members but that is perhaps to be expected from those who are free to leave if they are dissatisfied, and the Party should be encouraging both growth and retention at all times.

During the consultation the Panel noted consistent themes about providing more information to Members on political issues, consulting them more frequently and enabling more participation in political discussion. At the same time the Panel appreciates that there are significant numbers of Members who join solely to support our efforts to win elections and regard it as worth a subscription alone if they get a Conservative Government or council.

Although the Conservative Policy Forum does good work at the local level, the Panel believes the central Party needs to respond to this and better involve Members in national policy discussions.

While the number of Members is comparatively small to where it was a number of years ago, more people are taking a day-to-day interest in politics than ever before.

The Panel was interested to note that amongst the non-Member participants of our survey, 55% of respondents (who are clearly interested in the Party) had neither thought about becoming a Member nor believed they had been asked to join.

There is clearly significant potential to increase our membership levels and it is clear that the value-added benefits that other successful membership organisations offer are something we should consider. The largest of these organisations, like the National Trust and the Royal Society for the Protection of Birds (RSPB), offer their members a wide range of benefits, services and offers.

In order to facilitate the deeper involvement in politics that some Members want, the Panel believes that additional Silver and Gold levels of membership, each with additional benefits, should be created.

Members at each level would receive the following benefits (see overleaf) for the suggested annual fees:²

² Based on a submission from Ben Stephens and Peter Reid from Msq Partners Ltd.

	MEMBER £25 per annum	SILVER £50 per annum	GOLD £100 per annum
Influence	<ul style="list-style-type: none"> • Voting rights 	<ul style="list-style-type: none"> • Voting rights 	<ul style="list-style-type: none"> • Voting rights
Communication	<ul style="list-style-type: none"> • Access to Member-only content on website • Newsletter • Podcasts • Daily Briefings 	<ul style="list-style-type: none"> • Access to Member-only content on website • Newsletter • Podcasts • Daily Briefings • Daily news summary 	<ul style="list-style-type: none"> • Access to Member-only content on website • Newsletter • Podcasts • Daily Briefings • Daily news summary
Events	<ul style="list-style-type: none"> • Access to Conference • CCHQ-organised receptions 	<ul style="list-style-type: none"> • Drinks reception at Conference • CCHQ-organised receptions • ‘Meet the Minister’ events 	<ul style="list-style-type: none"> • Area at Conference and priority seating for Leader’s speech • CCHQ-organised receptions • ‘Meet the Minister’ events • Bodleian Archive Tours • Campaign calls with senior Party figures
Interaction	<ul style="list-style-type: none"> • Mobile mini-polls • Automatic membership of CPF 	<ul style="list-style-type: none"> • Mobile mini-polls • Automatic membership of CPF • Interactive policy questionnaires 	<ul style="list-style-type: none"> • Mobile mini-polls • Automatic membership of CPF • Interactive policy questionnaires • Campaign polling and strategy presentations
Commerce	<ul style="list-style-type: none"> • Merchandise • Third party offers • Joining pack and free gift 	<ul style="list-style-type: none"> • Merchandise • Third party offers • Joining pack and free gift 	<ul style="list-style-type: none"> • Merchandise • Third party offers • Joining pack and free gift

In accordance with the above proposals on centralised membership administration, the Per Member Levy would be set at 40% for these three tiers of membership, and PML would be capped at £20 per Member. Therefore the breakdown of the membership fee across the three tiers would be as follows:

Membership Level	Annual Membership Fee	Per Member Levy	Association Income
Member	£25	£10	£15
Silver	£50	£20	£30
Gold	£100	£20	£80

In cases where Members voluntarily pay above the annual membership fee, the full balance of a Member's fees (minus the PML) would be transferred to the local Association. Local Associations will be financially better off with this three-tiered system, as their income from membership fees will increase.

Fundraising for the central Party is not the purpose of this proposal. The levels are designed to offer a more refined membership experience and to provide better value for money for Party Members. The improvements in the interaction experience will allow Members to feel more engaged with the Party, and make their views heard both locally and nationally.

It is important to note that every Member across the three tiers will retain the full rights they have at the moment to attend Association meetings, select local candidates and vote in Party Leadership elections.

The Panel notes that there are many activists who give a huge amount of time and money beyond their subscription fees. The Membership Department, in consultation with senior volunteers, will be able to award a finite number of Gold memberships to activists who have given outstanding service to the Party; these awards will be made on nominations received from around the country.

Given the widespread support from Members for an exclusive area on the Party website, the Panel recommends that a Members-only area should be created on www.conservatives.com. This will contain policy surveys, articles from Ministers and MPs, and so on.

The creation of a Members-only area on the Party website will be a huge step forward in the Party's ability to communicate with its Members. The traditional forms of communication, namely email and postal mail outs, will still have an important part to play but these are often plagued by changing email and postal addresses. A Members-only area on the website would energise the two-way communication between the Party and its Members.

Members would be able to login on the Party's own website for exclusive announcements and op-eds from Ministers, MPs, volunteers, Members and others. Members will also be able to have their say through polls and questionnaires. There will be an editorial team employed in CCHQ to ensure that the website material is of a high quality, and is updated regularly.

It is the strong view of the Panel that the creation of a central membership administration system is crucial to increasing the number of Party Members, and the establishment of tiered membership is in the best interests of the Party and its Members. The aim of this is to make sure our Members feel more engaged with the Party, feel they have that added-value for their money and that their views are heard both locally and nationally.

C. Recommendations

Recommendation 1: Create a centralised Party membership system administered by a dedicated team at CCHQ. This would be rolled out on a region by region basis.

Recommendation 2: Establish three levels of membership.

Recommendation 3: Create and maintain a Members-only area on www.conservatives.com.

2. Party Structure

Background

The structure of the Party based on Westminster constituencies has existed from a time when there were fewer elections crossing constituency boundaries, thousands more Party Members and considerably higher income generated by those Members.

Most Associations have found it difficult to fulfil all the functions of a campaigning organisation and to adhere to the traditional model of maintaining an office, staffed by an Agent or Campaign Manager, with the financial resources to run regular and effective campaigns and communicate with the electorate.

Associations have addressed the problem in a number of ways. One approach has been to seek to retain the model but to reduce costs by decreasing their campaigning expenditure, often resulting in diminished capabilities and a lessened local presence.

The alternative approach has been to combine forces with neighbouring Associations to one degree or another, sharing premises, staff and equipment. In some cases this has simply been the operation of two or more Associations with a common administration. In fewer but an increasing number of instances Associations have federated or grouped themselves into one administrative unit within the rules of the Party's Constitution. Federations share income as well as resources.

Analysis of Association accounts from across the country shows that where Associations join forces in groupings and federations, the share of their income devoted to campaigning is higher than in those freestanding individual Associations where the proportion of their income spent on administration tends to be significantly higher.

A. Response from Members

General feedback on structure

There is divided opinion from the active Members of the Party as to whether the current structure is fit for purpose. Many feel that some Associations have become too small and are no longer able to fulfil all the objectives of the Party. Many Association websites are out of date.

A detailed submission from the Group Leader of Cheshire West & Chester Council suggests that the fragmented nature of a council campaign that included all or part of five different parliamentary constituencies with individual decisions being taken in each led to a missed opportunity. He also highlights that where councillors have a strong relationship with their MP or parliamentary candidate, the campaign has significantly greater cohesion. This is a recurrent theme throughout the meetings.

Another substantial submission was received from the West Ham Association proposing an "*Opposition Majority Seats Unit*". It identified the importance of such seats in many cross constituency elections that are held during the political cycle and felt that these seats were at risk of receiving insufficient attention from the Party centrally as they did not form part of the General Election focus.

These points were made frequently across the country but there were varied suggestions as to how to address them. The idea of grouping these seats into one point of focus in parallel to the "40/40" or target seats was a unique suggestion from West Ham alone. Alternative suggestions argue that grouping together such seats alongside their neighbours with professional support (see below) might prove less divisive. It was also stated that, having identified the need for these seats to contribute to elections involving their neighbours, it could be more productive to team them up with the seats where elections were being shared.

According to the Constitution, Associations are required to produce a Strategy Plan within 28 days of their Annual General Meeting and to present it to both their Executive Council and their Area Management Committee. In reality this rarely happens, and there is no formal definition as what should be in the plan nor how it should be measured. It is often cited as an example of what should be best practice. A number of contributors suggested that the strategy plan should use a nationally agreed format and that it should take the form of an Association audit, containing performance indicators that clearly related.

Groupings and federations

There was widespread discussion about the benefits or otherwise of Associations combining “*back office*” functions or merging entirely to form larger units.

Those arguing in favour say that this is what Conservative-led councils have been pioneering across the country for some years now and that this is a similarly logical step for the Party organisation. Modern communications mean that there is less need for numerous offices which are costly to maintain and that professional staff can successfully be deployed across more than the traditional single constituency. Expensive equipment is often under-used by its single constituency owner and there are a number of poorly negotiated photocopier contracts.

Boundary changes every five years will now mean that neighbouring constituencies are liable to be exchanging parts of their territory regularly, and that there is an increasing need for a level of organised cooperation across those seats. It is no longer politically or financially affordable for one Association to flourish while its neighbour might be deteriorating.

It is felt that successful campaigning cannot be maintained without the involvement of professional staff and that it is vital to organise at a scale where this can be achieved.

There is strong support for combined use of resources either through fully-fledged federations or groupings and the prevailing view is that this should be voluntary. However there is also a recommendation from some contributors that an Association should only be authorised to exist if it can demonstrate membership of a certain level plus a business plan to pursue the Party’s realistic goals in its respective area.

A number of Members have proposed that “*County Associations*” would provide more appropriate building block than the traditional constituency-based model and that these would be more viable both economically and politically given the need to fight so many elections on wider boundaries.

Arguments against combining forces

The minority of Associations who are still able to function on the traditional model tend to favour the status quo. However even strong Associations admit that they are suffering from reducing membership and income, running a declining number of events and spending little resource on campaigning or incumbency.

Other arguments against suggest that the sum of the parts is likely to be smaller than the individual Associations as activists are deterred by the loss of identity with their constituency. There are numerous examples of unsuccessful groupings and federations which suggests that this is not a panacea. It was argued that some federations have been wrongly structured as the component parts cannot feasibly provide the critical mass necessary to be able to employ professional staff and gain impetus. It is in these situations that federation can simply reduce the number of activists and sense of responsibility in the absence of a professional driver.

Training

This was an issue raised at every meeting. The spreading of best practice across the country is entirely ad hoc. There is no consistency, no general advice as to where written training documents can be found. Where they exist those documents are often out of date.

It was widely felt that the Party's most successful Associations are those that are well led, and that there needs to be more training and development of leaders to spread this across the organisation.

Association officers need to know the essentials relating to employment of staff and compliance, including on PPERA and the reporting of donations, as well as being given training on the role and duties of officers in an Association. Area and Regional officers need more guidance on their respective roles.

The training of officers that began in 2010-2011 was welcome in so far as it went, though it was commented that it concentrated on management and interpersonal skills rather than the specifics of being an officer in a political party.

There have been some popular training initiatives in some areas and regions but there is a demand for more structure and consistency. It has been emphasised that it does not need to be entirely delivered by CCHQ staff and that there are a number of experienced volunteers who have professional expertise that can be deployed.

Training could be delivered by a combination of face to face courses, training documents and webinars to enable as many people as possible to be reached.

Regions & Areas

There was relatively little feedback on the subject of Regions and Areas and what there was did not show much consistency. There was a general lack of awareness of these committees and although there has been some call for their powers to be increased largely for the purpose of solving disputes they do not appear to have captured the imagination over the 17 years since they were introduced.

There has been a lack of definition beyond the few words in the Party Constitution to steer the office holders into any common direction. In practice Regions tend to have become a step in what is an unconstitutional "*pecking order*" in that their role is technically limited to those matters that cross area boundaries and one or two other functions. But in the case of both bodies their relevance is very much seen in the light of the calibre of the people involved.

In some parts of the country, Areas have become too small to be effective and are populated by incumbent Association officers so that they cannot perform any kind of role in terms of assisting those Associations.

To a great extent those occupying Area and Region roles have been left to get on with it with little or no training or guidance. Although at one time they were gathered together with some regularity for meetings at which they could exchange views and network with each other, there have been few such meetings in recent years. In some Regions there have been regular initiatives to gather area officers together but no national direction or strategy.

B. Response from the Panel

The Panel is conscious that amid the widespread discussion about structure, there has not always been clarity as to the core functions of an Association. Appendix 1 seeks to set out the requirements for a viable Association and the structure needed to enable those requirements to be achieved. The Panel would recommend that Associations use this document as a checklist to measure and assess their current performance.

As part of the review process, a thorough examination was made of the Party's finances across the country.

The Panel found, perhaps unsurprisingly, that membership levels and Association finances are often better in Conservative seats with large majorities than in seats with small majorities or where there is no Conservative MP. This poses a challenge in terms of campaigning, as it is the seats with small or no majorities where the Party needs to focus the majority of its resources.

The situation, however, is not all bleak. The overall financial strength of the Party across the country is positive. Our Associations hold almost £34m in assets, mainly made up of cash and property.

Properties, in many cases, have not been revalued in a long time and therefore the value is likely to be much higher than this.

Our financial analysis, based on the 2014 accounts of every Association in England, showed that the total income across all Associations was just over £20m, with expenditure of £18.5m. To be clear, this is quite separate from the income and expenditure of CCHQ (except for PML payments and the target seat Associations that received campaign grants).

Of this £18.5m expenditure only £4.8m (26%) was spent directly on campaigning, with over double being spent on salaries and premises at £9.7m (53%).

The premises figure was calculated by combining costs such as rent, office costs, heating and lighting and so on. The large proportion of expenditure spent on premises is due to many Associations maintaining premises that, although historic and with sentimental value, are not necessarily appropriate to support the functions of a modern campaigning organisation.

It should be noted that these figures are compiled from over 400 sets of accounts, not all of which abided by the same accounting categorisations or accuracy standards.

However the methodology was designed to give an overestimate of an Association's campaigning expenditure rather than an underestimate. In addition to expenditure filed under 'campaigning' in the accounts, anything that could be construed as a campaign cost was categorised as campaigning expenditure in our analysis, such as printing, stationary, postage, election costs, etc.

The Panel acknowledge that some of the salaries figure would encompass campaign managers, which could reasonably be interpreted as campaigning expenditure. But the purpose of the exercise was to gain a clearer understanding of the Party's expenditure and to investigate how much of its revenue was spent on personnel, office costs and electioneering.

The Panel was interested to note that out of the total income of £20m, only £3.75m (19%) was raised through membership fees. Almost 50% of the total income came from fundraising and donations, and the Panel pays tribute to the huge fundraising efforts of the Party's Members and Associations.

This analysis shows that we need to find a way of directing more of the Party's sizeable financial resources towards campaigning and winning elections.

In some areas of the country, Associations have voluntarily come together to form local groups to share resources and "back office" functions, and work with one another on campaigning. In two counties, Gloucestershire and Somerset, this has worked very well and the results of this are clear.

In Gloucestershire 36% of expenditure is spent on campaigning and in Somerset this figure is 54%. Both of these counties featured heavily in our target seat campaign during the 2015 General Election, and now all the seats in both counties have Conservative MPs.

One very useful submission was from Andrew Kennedy, Group Agent and Campaign Director in West Kent, which was later published online.³

The Panel believes that if this approach were to be applied in other parts of the country, a vast amount of financial potential could be realised. Associations could consolidate their resources by sharing appropriate offices and working together in a more co-ordinated fashion. This would enable them to release more funds for campaigning, resulting in local and national electoral successes.

The Panel found that membership levels across Associations nationwide varied considerably. There are approximately 290 Associations with fewer than 100 Members. Only two Associations have over 1,000 Members, and just 50 Associations have more than 500 Members.

In addition, the Panel noted the numerous observations from Members that many Associations no longer have access to professional support in the form of a local agent. The Panel estimates that there are now fewer than 40 agents employed by Associations nationwide.

This lack of professional support in Associations is putting huge pressure on volunteers in an increasingly onerous regulatory environment. In the absence of an agent, the demands of complying with PPERA and donation regulations are burdening local volunteers.

In light of these developments, it is the view of the Panel that Associations should be given the option to form multi-constituency associations (MCA). The Panel was clear that the move towards a MCA would be conditional on the following principles:

- A MCA can only be formed where all the Associations in an area voluntarily come forward to request it. MCAs cannot be imposed on Associations by CCHQ.
- The MCA must then be ratified by a vote of the Party Members in the constituencies comprising the proposed MCA.
- In this vote, a constituency Association will be able to opt out of the proposed MCA if a majority of its Members vote against this proposal. This option would only be available to Associations with more than 100 Members, and if the Association can satisfy the Party Board that it is currently able to fulfil the functions outlined in Appendix 1.
- There will be no transfer or acquisition of properties and assets to the central Party. All assets formerly held by the constituency Associations forming a MCA will be held by the MCA in their entirety.

This procedure ensures that no operational Association can be forced into a MCA against its will by neighbouring Associations. If an Association decides to opt out of a MCA, this does not prevent the consenting Associations from forming a MCA.

MCAs would be as democratic and autonomous as constituency Associations. They would only be formed by the consent of their Members, and they would retain all the rights and privileges exercised by constituency Associations.

A MCA would only be dissolved by a vote of the MCA's Members, with a simple majority required for dissolution. A vote on dissolution would be triggered by a petition of 10% of the MCA's membership, provided that the MCA's membership is greater than 2% of the Conservative vote in that area. This threshold would ensure that any moves to dissolve the MCA has sufficient popular support amongst the MCA membership.

³ Andrew Kennedy, "Local Associations should move to merge into county or city groups after the Feldman Review", *ConservativeHome*, 23 August 2015, <http://www.conservativehome.com/platform/2015/08/andrew-kennedy-now-is-the-time-for-local-associations-to-merge-into-county-or-city-groups.html>.

In this structure, the constituencies themselves could operate, in effect, as branches of the MCA. Campaign activity will be coordinated at MCA-level however the constituency organisation would continue to be important for coordinating local social and campaigning functions.

In order to support any new MCA, they would receive the following:

- Residential professional training from CCHQ for its Officers on campaigning, compliance and fundraising
- Financial support from CCHQ to ensure at least one full-time professional campaign manager in each MCA
- Priority access to senior Party representatives and speakers for events
- Help from CCHQ with the drafting of its business plan

Associations that are currently federations may also wish to consider transitioning to MCAs. If they wish to do so, the same procedure outlined for constituency Associations will apply and they will be offered the full benefits of an MCA mentioned above.

Each MCA will be serviced by a modern, well-equipped, properly funded campaign office and will be staffed by at least one campaign manager (but in many cases considerably more professionals will be retained), thereby addressing the concerns of many Members about the regulatory burden and lack of professional support.

The MCA structure will therefore give all constituency Associations (that decide to form them) access to an office and professional support, whereas currently these are privileges enjoyed only by those Associations that can afford them. It is important to note that local MPs will still require a constituency office.

Due to the Parliamentary Voting System and Constituencies Act 2011, Associations will need to adapt to boundary changes every five years. This presents a challenge for constituency Associations, with Members and wards shifting across constituency boundaries. The creation of MCAs would mitigate these challenges as they would largely be untouched by the boundary changes. This stability presents an opportunity for MCAs to flourish whilst constituency Associations must deal with a shifting political landscape before every General Election.

It is hoped that the MCA will look at its entire property portfolio and manage it in the best interests of the MCA by retaining property that is useful and releasing, or renting, other property to generate capital income. CCHQ will provide professional and legal advice to Associations who request it on the management of their property portfolios. It will be a matter for each MCA to decide what to do with its property assets, and some may wish to retain more than one office.

Parliamentary candidates will be selected by Party Members within their particular constituencies as now, not by the entire membership of the MCA.

The Panel suggests that MCAs set up Local Government Committees (LGCs) for each council that they cover. Those LGCs would be responsible to the Executive Council of the MCA for driving the relevant local election campaign including creating approved lists of candidates and where necessary ensuring the selection of such candidates where membership of the Party in the relevant ward is below the usual threshold of 2% of the Conservative vote.

The Panel believes that a MCA pilot scheme should be formed, in which MCAs should be offered to Party Members in the areas suggested in the pilot. These Members will be given a vote on the formation of a MCA in their area.

C. Recommendations

Recommendation 4: Associations should be invited to benchmark their performance according to the criteria outlined in Appendix 1.

Recommendation 5: The Party Board will consider proposals for pilot schemes of multi-constituency Associations. This will only be for groups of Associations, all of whom have put themselves forward for consideration. Party Members in the proposed areas will vote on whether to approve the pilot MCAs. Associations with more than 100 Members and a fully operational structure will be able to opt out of the pilot MCA where a majority of their Members vote against. The details of the ballots will be published in due course following consultation with the voluntary Party.

Recommendation 6: Pilot multi-constituency Associations will receive the following from CCHQ:

- Residential professional training from CCHQ for its Officers on campaigning, compliance and fundraising
- Financial support from CCHQ to ensure at least one full-time professional campaign manager in each MCA
- Priority access to senior Party representatives and speakers for events
- Help from CCHQ with the drafting of its business plan

3. Candidates and their Selection

A. Response from Members

Parliamentary Candidates

Although there have been a number of areas of candidate selection raised during the consultation, there was also much praise for the quality of many candidates and Members of Parliament who have come through the selection process in recent years. In particular, the feedback on the 2015 intake has been very positive.

There was little criticism of the Parliamentary Assessment Board (PAB) process apart from the inevitable subjective examples of people who the contributors did not feel should be on the list and vice versa.

There were rather more comments about the pre-PAB process and whether candidates were being properly informed about the reality of life as a candidate. It was generally felt that it was important that either a member of the Field staff or an informed member of the voluntary Party should meet with would-be candidates before they applied for a PAB, and that there should be some filtering process before access to a PAB was given.

There were a number of comments that whilst there was then a certain amount of support, encouragement and training for candidates once on the list and before they had acquired a seat, it was important that this support is sustained after selection too.

CCHQ role in selections

The role of CCHQ in Parliamentary Candidate selection was generally seen as about right in the case of Conservative majority and target seats. Those Associations who had recently been through the process confirmed that they had not been under any undue pressure to select any particular individual and that the meetings held with members of the Candidates Committee had generally been helpful. It was felt that the notion of candidates being “*parachuted in*” was largely a creation of the media supported by those who had not been closely involved with the process. It was also a phrase sometimes encouraged by unsuccessful candidates.

There were some general suggestions and comments about administrative details, for instance that the option should be available to submit candidates’ applications/CVs electronically. This would speed up the process and make it more efficient. The need for a candidate’s signature on a CV seems to most people to be entirely unnecessary so long as the Candidates Department has verified that it is a bone fide application.

Given the delays to candidate selection there is a lack of information given to Associations about candidates making multiple applications. This can mean a drastically reduced number of applicants by the time shortlists are drawn up.

Now that there are fixed term Parliaments, it is felt that forward planning should be possible and Associations should be given their timetable for selection well in advance. It would also be good practice to advertise the dates for the selection meetings as part of the seat advertisement that is published to those on the list.

Selection in opposition non-target seats

A number of Members in Labour non-target seats had concerns over late selection of Parliamentary candidates and expressed a strong preference for selecting candidates early. This meant that some candidates in such areas did not feel they had enough time to make a mark in the constituency.

Whilst no one objected to the principle of campaign support there was strong regret that candidates had no opportunity to develop and grow their seats, in particular to aid in elections that go beyond our own majority and target seats e.g. European, Mayoral, PCC, devolved Parliaments and Assemblies.

A detailed submission from Matthew Smith, Association Chairman and Parliamentary Candidate in Bethnal Green and Bow, illustrates some practical benefits to all from early selection. His constituency took up the offer of a variant of the “*City Seats Initiative*” used in a number of London seats whereby an Association was allowed to appoint what effectively was a “*Parliamentary spokesman*” up to two years before the General Election. Matthew was in place from early 2014 and between then and May 2015 they grew their own membership by 33%, made frequent visits over a sustained period of time and a generous financial contribution to their designated target seat. In addition they were able to do a significant amount of campaigning and capacity building in their own seat that will be valuable for the 2016 campaign.

The specific suggestion from a number of submissions is that late candidate selection could be avoided by enabling credible local candidates to be selected who would not necessarily need to have already qualified for the full candidates list. However, the point was also made that any local candidate would have to be subject to a proper degree of scrutiny as they would be representing the Party in a national context.

It was suggested that in many constituencies the most realistic objective is to try to gain local government representation. There would be nothing to stop an unsuccessful Parliamentary candidate using the publicity gained in a General Election to later stand for a council seat.

A less radical suggestion has been made that candidates should be given leave to remain in the seat for which they are selected so long as they encourage their activists to help elsewhere.

Some Members feel there is too much emphasis on finding seats for candidates whereas it should be the aim to find the right candidates for the seats.

“*Primaries*”

There is no consensus on the use of Members primaries or full open primaries to select candidates. Some contributors feel they served to create new and wider interest in the process and gave added authority to the candidate selected. Others felt that it removed one of the few advertised benefits to being a Party Member, namely the right to select your candidates.

It was also felt that where there was a local candidate with organisational ability and support it was very difficult for others to compete and so the process was dispiriting to other candidates and sometimes to the active Members.

Monitoring of Candidate performance

It was acknowledged that this is not easy due to the number of candidates, their uneven demographic spread and the different stories that may lie behind them. There is a general acknowledgement that candidates both before they are selected and afterwards should be monitored though there has not been consensus on who should do the monitoring.

One of the difficulties that has been identified is that if the monitoring is assigned to certain roles it assumes that the people in those roles are always in a position to know how all the candidates in their area are performing.

Care of candidates

There was general and recurrent concern that candidates were left with no consistent support mechanism in place. Whilst there was some form of mentoring system in target seats, this tended to be piecemeal as candidates were paired with MPs whose involvement varied. There were some candidates who spoke highly of the support they had received from certain members of staff, MPs or volunteers but this was not part of an organised support system.

Some candidates who experienced stress from the pressure of campaigning, noted that they did not have a clear point of contact in the central Party.

The cost of being a Parliamentary Candidate

This topic arose regularly though was generally confined to those who had direct experience or interest in standing. The cost of fighting a seat depended on how early the selection was made. For anyone fighting these seats there was quite a considerable investment if they were there for any length of time in terms of travel, accommodation and often having to subsidise their own campaign costs.

Those fighting marginal seats incur the greatest costs as they are selected first and generally have to take considerable time out from work. The idea of a bursary scheme was popular. It has also been suggested that successful candidates could repay their bursaries over an agreed period.

A number of submissions linked the cost of fighting a seat with the structure of the Party on the ground.

Variety of candidates

There is a general call for “*non-career MPs/candidates*” though it was also pointed out that many candidates fitting this description were selected freely by Association Members acting under no pressure with a range of good candidates from which to choose.

A number of submissions regret the emphasis that is still placed by both the process and the membership on being able to make a speech and suggest that the system is still too geared to this skill at the expense of what might be regarded as more important attributes.

European & Westminster lists

The question of why there are separate lists for European and Westminster Parliaments has been raised. The specific answer is that it is currently required by the Constitution. Some Members feel the lists should be combined, though it has also been suggested that some candidates who are deemed suitable for one may not be suitable for the other as the methods of election are different.

Selection of local government candidates

Despite having been in government for five years the number of Conservative councillors remains at the very high level built up over 13 years in opposition. Councillors play a major role in the work of the Party and occupy many officer positions within Associations across the country.

Many councillors contribute financially either to their local Association or to a fund within their group. Some Members feel that this should be compulsory whereas others point out that it is the role of Party Members, including councillors, to raise funds for campaigning rather than to contribute directly.

Some Members seemed unaware that there are now mandatory forms for council candidates to complete but there were calls from those who were aware for more prescriptive demands in terms of guaranteed campaigning and promotional activity e.g. street stalls.

There were many calls for the “*double or treble hatting*” of councillor positions to be prohibited. It was said that this practice stifles new recruitment and causes tensions in some Associations.

This was not a unanimous view, with a minority claiming that it did not create problems. The decision on whether to allow this is not dependent on the Constitution, and Associations are already at liberty to create a rule to this effect should they wish to do so, either in the form of a rule within the non-mandatory rules of Schedule 7 or a decision by the Executive Council at any given time.

There is general support for the rules on the selection of local government candidates that have now been in existence since 2011 though there is a small minority view that feels that it should be entirely a matter for local decision and a rather larger opinion that would like the rules to be more prescriptive. It is an area that involves more activists than almost any other aspect of an Association’s activities and therefore attracts a lot of contributions.

A number of comments have been made and amendments suggested (not all consistent with each other):

- The right of the Executive Council to remove the decision-making powers from a properly constituted branch or to overrule it should be removed as it undermines the branch and the rights of local Members.
- It is unnecessary for sitting councillors to complete the mandatory application form annually when they are elected for four years. They should only complete it when their reselection is under discussion.
- In most small Associations the appeal through the Association Chairman and the Executive is often inappropriate as they are largely the same people who took the original decision.
- Although the right of appeal is only allowed on the basis of the process rather than the decision there are too many spurious appeals. There should be a review of the complaint by the Area Management Executive (excluding any Members of the Party in the relevant local authority area) and the AME should have final say with no further route of appeal.
- The Approvals Committee should cover the whole electoral area rather than being an option for the local Associations.
- The Approvals Committee should contain a majority of non-councillors. The current designated people could all be councillors and there is no requirement for the number of members of this body to exceed the designated people.
- The phrase “*most recent relevant election*” needs clarifying in determining the basis on which branch membership is determined.
- Rule 23 allows a committee dominated by people resident in one ward to determine the outcome in another ward.
- A branch committee can vary in number considerably. Should the Executive Council not have to approve its composition in the same way that it would do if it was a committee made up from more than one branch?
- The phrase “*automatic right to be considered*” in the case of sitting councillors is vague as it does not define what “*considered*” means. Should it be that they should be interviewed?
- Is a branch committee entitled to decide on its shortlist of one or more candidates without carrying out interviews i.e. on the basis of the paper application?
- Relations of candidates who are on the branch committee should not be allowed to vote.
- Relations of candidates on the branch committee should be allowed to vote as they are in effect no different from friends who are permitted.
- Allowing a meeting of a small branch to run a selection that is then going to be subject to the decision of the Executive is liable to cause issues amongst the members if the Executive chooses to overrule their decision.
- If the Members do not take the decision then one of the fundamental rights to select candidates has been denied to Members solely on the basis that there are not more Members.
- The rule that a Member must live in the ward to have a vote at a general meeting is at odds with the rule for the branch committee and affects those who work actively in a ward where they are not resident.
- Voting system should be laid down for both the one member and multi member wards

B. Response from the Panel

Candidate Outreach

The Party has had success over the last few years in attracting candidates from more varied backgrounds than we have had in the past. The number of our Parliamentary Candidates who were women and from ethnic minority backgrounds were both up from 2010. However, the Panel feels that the Party could do still more to ensure that our candidates for Parliament and for local government are recruited from all social and professional backgrounds, and from all parts of the United Kingdom.

For the 2015 General Election, 31% of the Candidates List were women and 11% were from BME backgrounds. 33% of our selected candidates were women and 13% were from BME backgrounds. The positive correlation between these figures shows that Associations have been doing well in terms of the diversity of their selections, and the room for improvement exists within the composition of the Candidates List itself.

The Conservative Candidate Bursary Scheme was announced at Party Conference in 2015. Initially, this Scheme will provide bursaries for selected candidates in target seats on a means-tested basis. A £250,000 fund will be established for this Parliament and is designed to help those, who could not otherwise afford to do so, to become candidates and invest the time needed to win in a marginal seat.

Of Members who took part in our survey, 77% of Members said they had not stood for election. The Conservative Women's Organisation (CWO), Women2Win, and our numerous link groups have worked well in reaching out to candidates from more diverse backgrounds and it is the view of the Panel that the Party should engage in a more proactive outreach exercise across the country to attract people to stand as Conservatives in local and national elections.

The Panel recommends that a Candidates Outreach Programme should be established to improve the diversity of the Party's candidates across all levels of government. This programme will be administered by the Candidates Department in CCHQ and will involve a series of workshops across the country designed to encourage more people to stand as candidates for Parliament, PCCs, devolved bodies and other positions in public life including school governors.

The workshops will involve talks from MPs, former parliamentary candidates, professional staff, representatives from local Conservative Associations and other key role models. A '*pipeline*' aspect will form a key part of the programme to assist and mentor individuals along every step of the candidates process.

The workshops will feature a predominantly local focus. The programme will reach out to local business groups, women's networks, community groups, and so on.

It is the opinion of the Panel that this outreach programme should be supported by the Party Leader and the Cabinet when they undertake campaigning tours. It is hoped that when Ministers tour the country they would also encourage individuals to consider standing as Conservative candidates across all levels of government.

The Panel believes that this well-funded, professional, coordinated outreach programme, with strong political backing, would improve the diversity of the Party's candidates, including their ethnic, gender, and professional backgrounds.

Candidates list and selections

At the moment, there are separate Candidate Lists for UK Parliament and European Parliament elections. Some people felt that this led to two classes of candidates. The Panel would propose that the lists be combined.

The Panel recognises that although there is a need to focus resources on target seats, this must be balanced with development work in opposition non-target seats. It is not acceptable to leave selection in these seats until the last minute and then to expect both the newly selected candidate and activists from those seats to abandon their seats to work in the targets.

The Panel accepts the suggestion that early selection could be achieved by allowing and indeed encouraging locally sourced candidates to be selected. Provided they can pass an approval panel, candidates could be permitted to stand in particular local seats. The Panel recognises that the most credible candidates in many opposition seats are in fact local people whose primary focus is their own area and whose own ambitions often lie solely within that area.

The Panel notes that early selections will not be possible before the completion of the boundary review in 2018, but feels it should be possible to improve significantly on the timing of selections that took place leading up to the 2015 General Election.

In respect of the selection of local government candidates, the Panel notes that there was a huge amount of feedback on this due to the fact that it is an area with which the majority of activists have involvement and experience. Much of what has been suggested is contradicted by other contributors so it would clearly be difficult to please everyone.

This is a process that falls under the Candidates Committee and considerable improvement in the process has been achieved by the introduction of mandatory rules some years ago, which have been revised and improved since then. The Panel would urge the Committee to review the feedback and make amendments to those areas of the rules where there is any lack of clarity or further area for improvement.

C. Recommendations

Recommendation 7: Create a Candidate Outreach Programme.

Recommendation 8: Create a single list for UK Parliament and European Parliament Elections.

Recommendation 9: Allow early parliamentary selections in opposition-held non-target seats where the local seat is able to produce a credible local candidate who can pass an approvals Panel, starting in this Parliament.

Recommendation 10: The Candidates Committee to consider the feedback on local government selection rules.

4. Other issues raised during the consultation

A. Response from Members

Relationship between CCHQ and the Voluntary Party

CCHQ is generally held in high regard for its campaigning and its focus on the political battleground. Most of the recent “40/40” seats are very complimentary of staff and quality of service and the level of financial and practical support they received. Field campaigners and campaign managers in particular were widely praised and welcomed. The corollary is that the majority of seats who were not in the political battleground are not necessarily aware of the effectiveness of CCHQ.

There is a general lack of awareness of the professional structure and some Members are not aware of the transition from ACDs (Area Campaign Directors) to Regional and Campaign Directors and more recently Field Directors, voluntary Party Managers and Field Campaigners.

A number of submissions have made comments along the lines that CCHQ should not be asking Party Members for money. This has been countered by those who point out that as the Party is only legally allowed to take money from people registered to vote in the UK, the subsection of the electorate committed enough to join the Party is inevitably and reasonably going to be the most likely source of donations.

Conservative Policy Forum & Political engagement

As can be seen from an earlier section of this report in terms of feedback from Members, there is an appetite for Members to get more involved in policy discussion.

Awareness of the Conservative Policy Forum (CPF) seemed to be very low in some areas. This might have been because the majority of the meetings were held before it had relaunched following the General Election.

There have been a number of suggestions for improvement:

- More regional conferences with political content
- A return to the CPC discussion briefs with responses from the ministers
- A policy competition in which Members submit ideas
- More Member involvement in the Party Conference

Party Conference

Many Members’ comments on Conference were very positive. Recent Conferences, according to these responses, have been much more enjoyable with much better attendance rates and great improvements in the quality and quantity of fringe events.

Whilst many Members acknowledge that the nature of the Party Conference has inevitably changed for all parties over the years, there is a feeling that more can be done to hold events at Conference for Members.

Some Members suggested holding Conference in the South of England as well as in Manchester and Birmingham. It has been suggested also that running the conference from Friday to Monday would make it easier for Members to attend without having to take so much time off work.

National Convention

A small number of contributors suggested that holding the Convention meeting at the Party Conference and within the secure area in effect imposes a charge on those attending who may not be able to afford to attend the conference itself. Others have pointed out that the meeting at the Conference is generally the better attended of the two.

There has been very little discussion about the role of the National Convention. It has been suggested by some Members that it should be replaced by a more democratic body with more powers.

Interface with Government Ministers

There is a desire for better communication regarding ministerial visits, as this will enable Associations to attract Ministers to speak at Party meetings and functions.

Members of Parliament

There is a generally held view that where there is a close relationship between Members of Parliament, their Associations and their councillors, there is more vibrant and cohesive Party organisation.

In particular, Members appreciate it when their MP communicates with them about what he or she is doing. An example of this is those MPs who wrote to their Members to explain where they stood on the Assisted Dying Bill.

There were a number of submissions on issues caused by Parliamentary candidates operating campaign teams external to the Association.

Targeting and Campaign Support

There is universal support for both the principle of targeting in elections and also for the non-target areas giving assistance in the target areas. A number of Members have commented that a policy of not working in unwinnable areas can serve to weaken these areas, reducing the number of activists in those seats and therefore their ability to give that assistance. Some Associations have pointed out that there is virtually never a time when they can be seen as a priority as there is always a neighbouring target Parliamentary or council area that needs their help.

In terms of campaign support during and in the lead-up to the general election there were a number of comments about the need for better organisation where people were being asked to help. There were a number of comments about the fact that in some circumstances there were competing demands from Associations and Team2015 about where to campaign.

It was suggested that some very good relationships were built between 40/40 seats and their twinned Associations and that these relationships should be maintained afterwards.

Given that the dates of future elections are all mapped out it was felt that campaign support arrangements should be established and properly communicated at an earlier stage than has happened in the past.

Social Media and Web presence

There is widespread acknowledgement that some local Associations are generally very weak in terms of their social media and web presence. Many requests were made from contributors for more training and guidance on this. There are numerous examples of poorly maintained and out of date constituency websites, many are not user friendly and are not even easy to find.

The autonomy of constituency Associations means that there is no common standard format and no consistency of quality. The suggestion was made that in the modern age there should be an officer position in every Association who would have responsibility for digital and social media.

It was also suggested that as this is something of a generational issue, far more use of the expertise of younger Members should be made in the development of improved websites and social media.

IT & VoteSource

A number of the comments were made on VoteSource. The key points generally are:

- Concerns about whether there is a proper plan of development for VoteSource.
- There is always a quoted “*priority*” and many Associations, including those with forthcoming elections are told they are not it. This has been going on for years but more recently it was that Membership was not a priority because of the General Election (which people understood).
- There is a feeling that the Helpdesk must be properly resourced after the General Election.
- There is insufficient training for VoteSource. People have also asked what happened to the webinars that were running during the GE and whether they could be reinstated.
- The point has also been made several times that whilst it is theoretically a good thing to give web access to activists to input data, there is a danger that mistakes will be made by poorly/non trained people unless the system is so robust as to be proof against this.
- Some of the specific issues were raised, e.g. the apparently poor searching mechanism for voters whose names are expressed in a slightly different way on the register, inability to do a basic “*Dear Mr Bloggs*” mail-merged letter. Many of these features have been improved since these comments were made.
- A number of Members commented that they experienced system issues in the run up to the General Election.
- Though there was criticism of the decision to introduce a partially developed VoteSource programme for the General Election, the majority of users in the target seats felt that the rollover was a success and that the programme functioned very well.

Young Members and Conservative Future

Events culminating in the suspension of the National Executive Committee of Conservative Future have occurred since the majority of meetings had taken place. During the general comments from earlier meetings, there was no clear agreement about whether there should be a Conservative Future national structure. To that extent it could be seen as preferable to develop youth groups at Association level.

It is clear that this topic needs considerably more discussion than it has received as part of this review.

At the review meetings there was often a lack of awareness of who was coordinating youth and student activity within the Party and how it was being done.

Young MPs should get around the university campuses moving beyond their own constituencies in order to achieve greater coverage.

At recent General Elections the Party could have won more support from young voters, and Members want this to change.

Conservative Women's Organisation

There has been little discussion of the Conservative Women's Organisation at the main meetings nor in the written submissions received, though the National Executive of the CWO did invite some Panel members in order to give some feedback.

The CWO nationally feel that whilst they have achieved some great success in bringing forward successful women candidates to Parliament and local government they are struggling for recognition from the Party hierarchy. They believe they are treated more as a "*friends*" organisation than a mainstream part of the Party.

In so far as the issue of CWO at local level has been discussed, views range from those who feel that having a local CWO organisation can be useful in both campaigning and raising the profile of women to those who feel that women should simply work alongside other members of the Association on an equal basis.

Police & Crime Commissioners

There was a feeling that more needs to be done to engage with Conservative Police and Crime Commissioners and that any Party engagement had largely been undertaken by the PCCs themselves.

This was not a topic that was raised very frequently and some would suggest that as a symptom of the problem.

Fundraising

Although there is a dedicated central function that delivers the fundraising for the national operation of the Party, it was widely observed that the ability of local Associations to raise funds has diminished, not only in terms of numbers but also in expertise. There was a feeling expressed that, although campaigning has to be the principal focus of the Party, an opportunity is missed by neglecting local fundraising. Even basics such as election fighting funds which at one time were run unfailingly by Associations for General and Local elections are no longer held universally across the Party. There were numerous calls for more training and guidance to Associations on fundraising to enable them to maximise their local potential.

Harassment & Bullying

This topic is the subject of its own investigation and review.

Compliance and data

The CCHQ Compliance Department is generally regarded as helpful and informative. It plays an important role in communicating the increasing number of regulations and is essential in ensuring that Associations keep to the law. It is felt that the obligations in respect of compliance are not always accepted and understood by some officers despite the endeavours of the department to inform them. It can be seen as another manifestation of the difficulties arising from small unstaffed Associations. There are also a minority of officers who mistakenly think that the demands upon them are internal rather than externally imposed by the Electoral Commission.

There have been requests that compliance be included in training for key officers.

There is some concern that the Data Protection Act is being used as an excuse to prevent the legitimate use of data by others. For example in some branches the branch officers are not allowed the details of their Members. There are calls for a clear policy setting out who can have access to membership or electoral data and for what purposes it may or may not be used.

Northern Ireland Conservatives

Members in Northern Ireland point out that roughly half the population does not vote in elections in the province nowadays and that their non-voters are predominantly people who would vote Conservative if they lived in England. They feel they could have a chance of gaining representation in some places if they could target these non-voters.

They appreciated having a Campaign Manager provided for them during the General Election but are disappointed that funding then ceased.

They would be happy with a centralised membership administration.

Like other challenging areas they were sorry that their candidates were not selected until close to the General Election though they were very complimentary about the calibre and dedication of the candidates. They echoed the point made elsewhere in the UK that they could have more impact with early selection, but they also recognised that they need to identify local candidates. Their best Parliamentary performance was in Strangford where they were able to field a local person.

They are pleased with Votesource but would appreciate more training, if only via Webinnar.

As part of the review they would like to see the position of their Chairman on the Party Board put into the Constitution.

Social Action

A number of contributors have suggested that a more integrated approach to social action is needed and that it should be a more long-running community commitment. Suggestions include job clubs and community coffee mornings for the elderly and lonely. Some of our opponents have launched comparable initiatives and successfully embedded themselves in the community.

Miscellaneous Constitutional Issues

Changing the Constitution

Changing the constitution is very complicated which means that even simple and uncontroversial amendments are not currently possible without using the electoral college where the bars are set so high that it can be a struggle to excite sufficient interest to attract the necessary votes.

It has been suggested that there should be effectively two different levels of change whereby only the most major changes are subject to the complexities of the electoral college and smaller changes should be easier to make. Some potential changes that have been requested are illustrated below.

The “Three year rule” for Association, Branch, Regional & Area Officers

Several representations suggest that with fixed five year Parliaments it might be more appropriate to adopt a maximum five year term for officers. It has been pointed out that the current rule can often mean officers having to stand down just before an important set of elections which can prove disruptive. However, there has also been a considerable amount of comment about “bed blocking” with officers being reluctant to stand down and often resuming the office after a short break.

Should the maximum term be extended it is then suggested that there should no longer a provision to stand for a further year and that a new rule should be introduced to the effect that an officer could not return to the same office for a period of at least six years.

Timing of Annual General Meetings

There have been a number of requests that the statutory date by which an AGM should be held should be moved from end of March to a date after the May elections. There are some Associations who do not adhere to the existing rule, without being penalised. The benefit of this would be that it would be more logical to change officers at the end of the annual elections. Although not every Association has elections annually, there is a clear annual cycle for the Party generally that revolves around the first Thursday in May.

Area Councils

Current rules state that two Area Council representatives from each Association should be elected by the Executive Council. This has been suggested as unnecessary and that it should either take place at the Annual General Meeting or that Area Council representatives should simply consist of the Chairman and two deputies as these positions are generally filled.

It has also been pointed out that there is a lack of clarity in terms of the representation on Area Councils and indeed the National Convention in the case of Federations. Those who are part of Federations claim that they would be under-represented if they were not allowed the same number of representatives as they would have as free standing constituency Associations.

Reselection of sitting MPs

A recurrent call from Members is for the reselection of a sitting Member of Parliament to be determined by a vote at an Annual General Meeting or SGM rather than by what in many cases is a small Executive Council. Some feel that the current rule weakens the right of a Party Member to select their candidates. It has been suggested that it could be a process conducted by online ballot (with provision for those without internet access).

Executive Councils

There is a strong feeling that there should be a revision of the make-up of an Executive Council. It is currently determined by branches that in many cases do not exist. This means that when the role of the Executive Council is defined in processes such as candidate selection it can be a very small and skewed body.

Voting procedures

There have been a number of comments about inconsistencies in voting processes within the organisation. Some elections have become primarily online (eg London Mayor, National Convention), others are postal ballots (eg reselection of a sitting MP when not endorsed by the Executive, Regional co-ordinators) whereas others still require Members to attend a meeting and vote in person (eg Association & branch AGMs, selection of Parliamentary and council candidates, PCC candidates)

Trustees

There were a number of representations on the subject of trustees. Although the Board produces a model trust deed which is meant to be mandatory, there are numerous cases where this is not used, where trustees are not annually appointed. There is also confusion as to the role of trustees with a frequent assumption that they can generally instruct the Association about the deployment of the assets of the Association. There have been requests for more clarification about the role of trustees and proper enforcement to ensure that where trustees are required they are duly appointed and confirmed regularly.

B. Response from the Panel

The Panel had not sought to examine every possible aspect of the Party organisation since the core remit it had set itself of membership, structure and candidates was already a considerable undertaking. However, rather than restrict the areas of Members' feedback, notes were taken on other areas of concern and interest to Members during the consultation which has resulted in the inclusion of this section.

Therefore a response from the Panel is indicated below. It was not felt necessary or appropriate to make a proposal in respect of every topic at this time.

Relationship between CCHQ and the Voluntary Party: The Panel welcomes the introduction of an Organisation Department with its own director and resource and sees this as a strong indication that the Party is committed to organisation as well as campaigning. It would encourage efforts to ensure that information is disseminated in a timely manner as many of the complaints pertaining to CCHQ are about communication and information. Initial steps such as the regular Organisation Department Bulletin have been warmly welcomed by Associations.

In regard to fundraising appeals from CCHQ, the Panel feels that objections from Associations are an inevitable consequence of an organisation that is funded locally and nationally from what is essentially the same source, i.e. public voluntary donations. CCHQ is almost entirely funded by central fundraising efforts and it is not feasible for it to raise money without appealing to people who by definition will be constituents in areas covered by Associations. Any efforts to ensure that there is some synchronisation in approach between National and local efforts is always welcome, though with so many units operating throughout the country this is never going to be simple to achieve.

CPF & Political engagement: The Panel notes the interest from many active Members in more opportunities for political involvement and believes that proposals around membership involving online participation can open new avenues for rank and file Members. Initiatives such as Area conferences and CPF discussion groups already exist in many Areas and Associations and should not require any centrally directed organisation.

Party Conference: The Panel notes the popularity of Members-only sessions at Conference, and believes that these sessions should be used for policy and campaign discussions.

Regarding the location and cost of the Conference, the Panel would encourage the Conference Committee to look at any initiatives that could reduce the costs to Party Members without damaging the viability and profitability of the event.

The Panel welcomes the fact that the 2015 Party Conference was the largest ever Conference, with the largest exhibition hall and the best attended fringe events. 11,000 delegates attended the 2015 Conference, of which 5,500 are Party Members. This is considerably more than the 2,200 Members who attended the Blackpool Conference in 2005.

National Convention: The Panel noted the very small number of representations relating to the National Convention and did not feel it necessary to comment further. In respect to the MCA proposals, the Panel suggests that MCAs should be able to send delegates to the National Convention in accordance with the number of constituencies comprising the MCA.

Interface with Government Ministers: The Panel notes the difficulty of keeping Ministers linked in with the large number of Associations, all organised and operating to different degrees. It believes that recommendations in the structure of Associations suggested above, involving a smaller number of Associations, would make it much easier for Ministers to dovetail non-political and political visits and to assist with local fundraising initiatives.

Members of Parliament: The Panel notes that the Party has in recent years taken many new initiatives to assist Members of Parliament to use their incumbency and this paid dividends in the General Election. It also notes that where MPs are at the forefront of their Associations, helping with recruitment of Members, activists and local government candidates, the most flourishing Associations and relationships exist.

Targeting and campaign support: The Panel acknowledges the concern expressed in non-target seats and appreciates that neglecting these seats would be counterproductive. It is also the case that many of these seats need to play an important role in those elections that extend beyond constituency boundaries. These Associations would receive better service if they became part of the larger multi-constituency associations recommended in Chapter 2, and a more local and early approach to Parliamentary candidate selection should also enable candidates to assist in the building of greater capacity in these seats.

Social Media and online presence: The Panel acknowledges that there is a very patchy use of social media and websites across Associations. It supports the suggestion that there should be an officer position in each Association to spearhead the use of digital media. It does not feel that this requires any change to the Constitution as it can be incorporated in the non-mandatory rules of Associations.

IT & VoteSource: The Panel noted that there were many comments from Members regarding VoteSource during the consultation process. It notes that improvements to both campaigning and membership aspects of the software are constantly being implemented with a corresponding decline in complaints and does not feel that it can add usefully to the debate nor that there is much to gain from revisiting the history of its development.

The Panel also noted the following positive aspects of the introduction of VoteSource for the 2015 campaign:

- Without VoteSource, the highly sophisticated targeting of voters in 40/40 seats would not have been possible.
- For those in 40/40 seats who were properly trained in VoteSource, it was for the most part a very powerful campaigning tool.
- The Membership function was the last stage of the development because it was not campaign critical, and therefore it experienced more teething problems than had been anticipated.
- VoteSource radically transformed the annual rollover process as well as the processing of monthly updates of the electoral roll. Both the speed of these processes and the accuracy of the matching have improved significantly.

The Panel would, however, suggest that there should be as much transparency and openness as possible about the current limitations of the software and a clear statement of development plans with a realistic but not restrictive timetable. All opportunities to provide training should be taken including the use of web-based seminars. The Helpdesk should be adequately resourced.

Young Members and Conservative Future: Recent events culminating in an Inquiry ordered by the Party Board and the suspension of the National Executive of Conservative Future have developed since the majority of Party review meetings took place. It is clear that the important topic of youth engagement now needs to be examined in greater detail and the Panel recommends it is given separate priority, subject to deeper analysis and relevant findings of the Inquiry. Chloe Smith MP has been asked to lead on this.

Conservative Women's Organisation: The Panel believes that generally the role of the Conservative Women's Organisation is to encourage the involvement of women in the Party organisation leading to their becoming office holders, candidates and Members of Parliament. It would not seek to alter the existing status of the current CWO but would again recommend the inclusion of a designated officer position at Association level, which can be a non-mandatory amendment to Association rules.

Police & Crime Commissioners: The Panel notes that there have been few representations on the subject of PCCs but would make the general recommendation that Areas should work to include our elected PCCs in the life of the Party to prevent detachment and to ensure a two-way flow of communication.

Fundraising: The Panel notes the lack of training in fundraising at Association level and the consequent diminution of best practice. CCHQ and Areas should work together to ensure that training in event planning and fundraising appeals is provided for the relevant officers.

Harassment & Bullying: The Panel is mindful that the Party Board has commissioned a separate review into the Party's governance procedure, which will cover its policy on bullying.

Compliance and data: Whilst the Compliance Department already issues clear and thorough guidance in this area, the Panel believes that the acknowledgment of this guidance must become a required part of Association officer training and adherence to it must be part of the absolute standards required of elected officers.

Northern Ireland Conservatives: The Panel believes that the Party needs to have an unequivocal position on the role of the voluntary Party in Northern Ireland. It needs to be accorded the same basic support from CCHQ as any other part of the UK. Although there is a case that its Chairman should have a designated position on the Party Board in line with those of Scotland and Wales, the fact that there are currently only around 300 Members in Northern Ireland means this proposal should be kept under review. The Panel believes that the current arrangement whereby its Chairman attends the Party Board as a non-voting member should continue.

Social Action: The Panel believes that social action is very important and would recommend that this area is revisited.

Link groups: The Panel believes that it is necessary to clarify the rules governing the party's relationship with link groups and other organisations unofficially associated with the Party. This will be covered by the governance review and the Panel recommends the Party Board consider the proposals of this review.

Miscellaneous Constitutional Issues: The Panel has considered many of the proposals submitted by Members during the consultation and makes a number of proposals. Many of these are in response to submissions from Members and several are designed to reflect the fixed five year term of the Westminster Parliament.

The Panel recommends that the election and make-up of Area Councils should be considered in the light of the feedback referred to above.

The Panel would urge the refocus of Regional organisation to carry out the task set out in the current Constitution, namely the coordination of European elections and ensuring the strategy of the Board in relation to Parliamentary boundary changes is implemented.

In relation to the re-selection of sitting MPs the Panel shares the concerns that Executive Councils are often too small to conduct this process and that rank and file Members are denied a vote but believes that since there will be a boundary review during every Parliamentary cycle from now onwards, the selection by Executive Council will become obsolete.

The Panel agrees with comments that the composition of Executive Councils has failed to produce a viable democratic body in many cases due to the reduced size of Associations and recommends that a revised composition is produced to redress this.

The Panel also recognises the concerns relating to inconsistency in the voting processes used in the various internal elections and selections held within the Party. It recommends that these are streamlined where possible and that all opportunities are taken to use online methods and generally to make it as easy as possible for Members to take part.

The Panel echoes the request made by many Members to address the widespread cases of irregularly constituted trustee arrangements and recommends that a register be drawn up listing every trust held within the Party and any registered company that exists to shelter the assets of Associations.

C. Recommendations

Recommendation 11: The “*Three year rule*” for Association, Branch, Regional & Area Officers should be amended to a maximum of 5 years, subject to annual re-election. There should no longer be a provision to stand for a further year and a new rule should be introduced to the effect that an officer could not return to the same office for a period of at least six years.

Recommendation 12: The statutory date by which an AGM should be held should be moved from end of March to end of June.

Recommendation 13: Create a register of trusts and companies to safeguard the assets of local Associations.

Appendix 1: Defining a Conservative Association

Introduction

The Constitution, as amended from time to time, sets out the structure of an Association and the rules that it should follow. It also sets out the objects of an Association:

The Objects of the Association shall be to sustain and promote the objects and values of the Party in the Parliamentary constituency of (“the Constituency”); to provide an effective campaigning organisation in the Constituency; to secure the return of Conservative Candidates at elections; and to raise the necessary funds to achieve these objectives; to contribute to the central funds of the Party. *(Schedule 7, clause 2)*

But it does not set any benchmarks as a means of measuring whether or not an Association is delivering those objects. Within the Party, there will often be talk of a ‘good’ or ‘bad’ Association but it is not made clear what an Association has to do to be evaluated in such a way.

The guide below is a checklist to measure how an Association can be seen to be achieving its objects. It should be noted that the measurements will not always be the same across all seats. Though it does not purport to be an exhaustive list, the items below are mainly the absolute essentials to run a successful Association.

The Constitution requires all Associations to adopt an annual strategy plan. A template will be supplied for this but it will need to incorporate many items relating to the points below.

Communication with Members, Supporters & Electors

Membership: A Conservative Association should have a current membership level of at least 0.75% of the Conservative vote at the last General Election. All Members should be recorded on VoteSource.

Member contact: An Association should be in contact with its Members. During the year, every Member should receive a phone call from either an officer, councillor, MP or parliamentary or local government candidate to thank them for joining or renewing. The caller should ask what they are interested in, invite them to functions, and ask for their help. Members should be asked whether they have any additional skills that might be of help to the Association in addition to canvassing and delivering. They should also be asked for their email address to make it easy to keep in touch with them. Members should receive a regular newsletter either in hardcopy or electronic form.

Telephone response: If a Member of the public or Member telephones an Association Office they should generally find the phone is answered during standard office hours. If someone leaves a message on an Association answer phone, the Association should contact them promptly.

Offers of help: If a Party Member or a member of the public offers to help, they should receive a response within a week, thanking them, setting out how that offer will be taken up and when they should hear further.

Activist Recruitment: The Association should have a plan in place to recruit activists and potential council candidates from the membership and the wider supporter base.

Website and Facebook: Every Association should maintain a functioning website and Facebook Page. It is not sufficient for the website to exist, it must contain news that is up to date. There should be events listed on the events tab. There should be clear contact information and it should be easy for a member or volunteer to engage with the Association. If someone makes contact via the website, they should receive a prompt response and there should be a policy that Association adheres to in terms of how quickly they are contacted, by whom and in what way.

Newsletters and voter communication: The Association should have a programme of newsletters for the ensuing year. This should include a minimum of three communications outside election time.

Email addresses: The Association should actively ensure that it has email addresses for as many Members as possible and should constantly be adding to the number of email addresses it has for supporters.

Delivery network: The Association should know how many deliverers it has. These should be assigned to specific routes and a constant record kept of where any gaps may be. The Association should know how long it would take to get a leaflet out to each household or to a key target area.

Poster Sites: The Association should maintain an up to date list of poster sites for use in election campaigns.

Voter identification: There should be a written programme of canvassing or surveying throughout the year, including any elections. Pledge targets and a target for voter contacts should be set each year.

18 year olds and new voters: The Association should have a plan in place for introducing the Party to first time and new voters.

Internal housekeeping, organisation and administration

Rules: Every Association should maintain an up-to-date and formally adopted set of rules. These should be clear in respect of those rules that are optional, for instance where the rules say you may have “*one or more representatives*”.

Meetings: The Association should have a schedule for its obligatory meetings during the year – AGM and Executive Council Meetings. Proper notice of these meetings should be given to all Members and it should be noted that constitutional notice periods are minimum.

Executive Council: The Association should know who is on its Executive and should be able to supply an up-to-date list if requested. Members should be properly appointed. The Executive should clearly establish any committees such as CPF, Youth, Women, Business, Patrons Club and so on, and should ensure these are either functioning or closed down.

Branches: The Association should aim to create functioning branches (a functioning branch is one that meets, campaigns and raises money) and should know what proportion of the constituency is covered by these. There should be an annual target of improvement in branch coverage.

Campaign support: Every Association should have a plan in place for giving help to other seats during elections or by-elections. This should include a list of activists who are prepared to be called upon when these events occur.

Selection of local government candidates: The Association should maintain an approved List of local government candidates and have a selection process in place that is according to the rules supplied by CCHQ. All candidates (including sitting councillors) are required to submit forms for inclusion on the Approved List and a file of these should be maintained.

Local elections: The Association should routinely contest all vacant seats at elections and by-elections.

Councillors: The Association should ensure that all sitting councillors are paid-up members of the Conservative Councillors’ Association as required by the Constitution.

Elected representatives: The Association should have a means by which its elected representatives can keep in touch with Members and keep engaged with them.

Finances: The Association should have a published budget (available to its Members) that includes sufficient income and expenditure to finance the objectives listed in this document. This includes the ability to raise funds for and contribute to all elections including European, Police Commissioner, Mayoral and Assembly (where applicable), as well as local government and Parliamentary.

Fundraising: The Association should have a programme of fundraising activities to finance its budget along with its membership subscriptions.

Property: If the Association has any property or assets it should have a properly written trust deed and trustees who are annually appointed/reappointed by the Association.

Association Office: An Association should have an office or use of an office that adequately serves the purpose of enabling it to fulfil the above objectives. This should be manned during office hours and must be cost-effective. It should have equipment that is used to its capacity and is not left unused.

Freepost Account: The Association should have an up-to-date freepost account for campaigning and fundraising purposes.

VoteSource: The Association should have at least two authorised Members who are able to use the Party's campaigning and membership software. All information relating to membership, telephone numbers and email addresses should be maintained on this system.

Blueprint & Connect: All Associations should have logins for these systems.

Compliance: Officers of the Association should be aware of the compliance requirements in the PPERA legislation in terms of donations and accounts. The officers should be aware of their obligations as an employer and the position of the Association regarding Data Protection

Bullying & harassment: The Association should have a written policy on its attitude to bullying and harassment and should know how to process a complaint in this regard. Guidance on this to be supplied by CCHQ following the governance review.

Suspension & expulsion of a Member: The officers should be aware of the guidelines on this and should not begin to undertake this process without taking advice from CCHQ.

Staff: Unless the Association has the benefit of an outstanding amount of voluntary time from an administrator and campaign manager, it is unlikely to be able to fulfil the objectives set out above without employing staff. The Association should be able to finance staff to organise the Association and its campaigning and fundraising. It should be noted that employing staff requires the Association to have sufficient resources for the staff to function i.e. a budget that includes a significant campaigning element. Staff should have a proper contract and all should be paid at least in line with minimum wage legislation.

Where to get help beyond the Association: The Association should know who its Area officers are and how to contact them. The officers should also know who to contact at CCHQ if they have queries or problems.

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