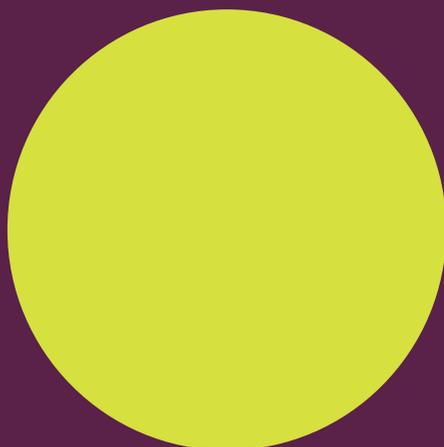
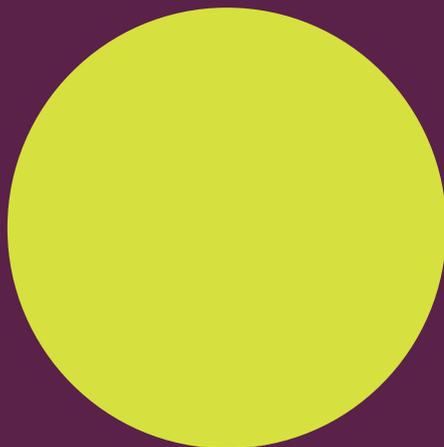
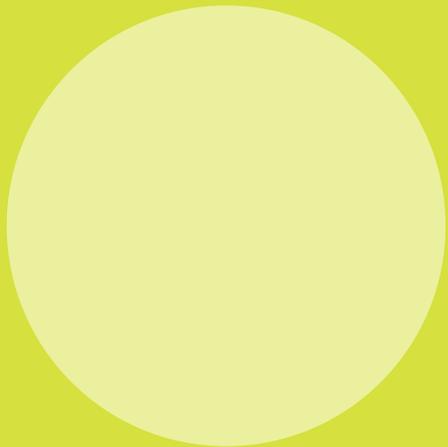
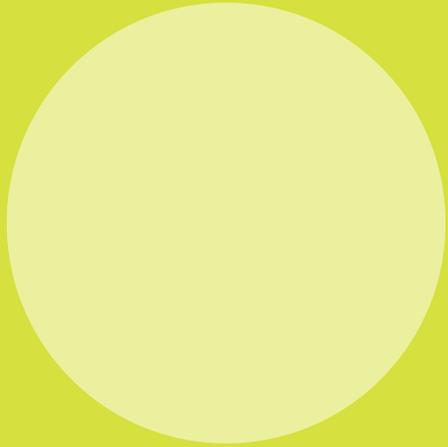


# Campaigning National Occupational Standards

Pocket-sized edition



**skills**  
THIRD SECTOR



Published by Skills – Third Sector  
The Circle, 33 Rockingham Lane, Sheffield S1 4FW  
0845 450 3860

Published November 2010

© Skills – Third Sector November 2010

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system or transmitted, in any form or by any means, electronic, mechanical, photocopying or otherwise, without the prior permission of the publisher.

Available in alternative formats contact  
[info@skills-thirdsector.org.uk](mailto:info@skills-thirdsector.org.uk) or 0845 450 3860

National Occupational Standards tell you what you need to know to do your job well. There are National Occupational Standards that cover all industries and areas of business. Skills – Third Sector is responsible for developing the National Occupational Standards covering key jobs and roles in third sector organisations, including social enterprises.

## Contents

Introduction

Using this guide

Campaigning and voluntary sector organisations

Campaign stages

Stage one: Setting campaign objectives

Know what you are campaigning on

Develop a vision

Gather your evidence

Stage two: Planning a campaign

Develop a campaign strategy

Identify your campaigning resources

Develop a work plan

Develop a campaign identity

Write a monitoring and evaluation framework

Stage three: Implementation

Run the campaign

Build your campaign team and relationships

Produce campaign materials

Stage four: Measuring your impact

Monitor and evaluate the campaign

Skills and behaviour

National Occupational Standards for Campaigning

Using National Occupational Standards

Glossary

Further information

Resources

Training

Contacts

## Introduction

This guide sets out the skills, knowledge and understanding that campaigners need to do their job well. It focuses on the 'what' you need to do and know rather than on 'how' to do your job - we list other resources that do that.

This guide is based on national skills standards that have been set by people who work and volunteer in charities and social enterprises. Known as National Occupational Standards, these are the things experienced practitioners agree that you need to know and be able to do in order to do your job well. There is information about how to use National Occupational Standards and a full list of the National Occupational Standards for Campaigning at the end of this guide.

This is a practical guide for campaigners of all levels. It reflects the highly distinctive nature of campaigning and can be used by people who are employed as campaigners full-time, part-time, as part of another role, or by people who volunteer as campaigners.

It can also be used by people who manage campaigns to help them recruit people who have the knowledge and skills to campaign effectively and identify what training their campaigners will benefit from. Managers can also use this guide to help design annual appraisals for their campaigners.

"As someone who is responsible for campaigning, and for recruiting and managing paid and volunteer campaigners, this guidance on the National Occupational Standards is useful because it is practical and provides clarity in an easy to follow format. Perfect to fit into the busy day to day life of a campaigner."

*Anne Fox, Head of Campaigns and Public Policy, NCT*

## How to use this guide

This guide is broken down into the four main stages of campaigning. Each stage is based on the National Occupational Standards and consists of an overview, a list of the main activities and information about what people need to know and understand.

**Overview:** this 'sets the scene' and describes why each stage is important to your campaign, why you need to do the activities and why it is essential to know and understand the points recommended.

**Main activities:** these describe the activities that you need to be able to do to run that stage of the campaign effectively. They describe 'what' needs to be done at each stage of the campaign. They do not cover 'how' to achieve particular results. The individual tactics you use, such as organising events, rallies or petitions, will depend on who you are aiming the campaign at and what you want to achieve. If you need ideas on how to run your campaign then there are resources listed at the end of this guide that can help.

**Know and understand:** these are things that a campaigner should know and understand to carry out the activities at each stage of the campaign. Knowledge and understanding are important to underpin the skills and abilities needed to carry out a task.

At the end of each campaigning stage you will find a cross reference to the name of the National Occupational Standard, or Standards, that stage has been based on and at the end of this guide there is a full list of the National Occupational Standards for Campaigning. This is to make it easy to use this guide alongside the full National Occupational Standards.

“It is vital that organisations invest in developing the skills and capabilities of their campaigning staff to ensure that the sector is working as effectively as possible to achieve progressive and long-term change. Therefore, having a clear set of criterion for the skills and knowledge required from campaigners is crucial. This guide is a welcome tool and will to help make a considerable difference to professionalism in the voluntary sector.”

*Brian Lamb, author of the Good Campaigns Guide 2010*

## Campaigning and voluntary sector organisations

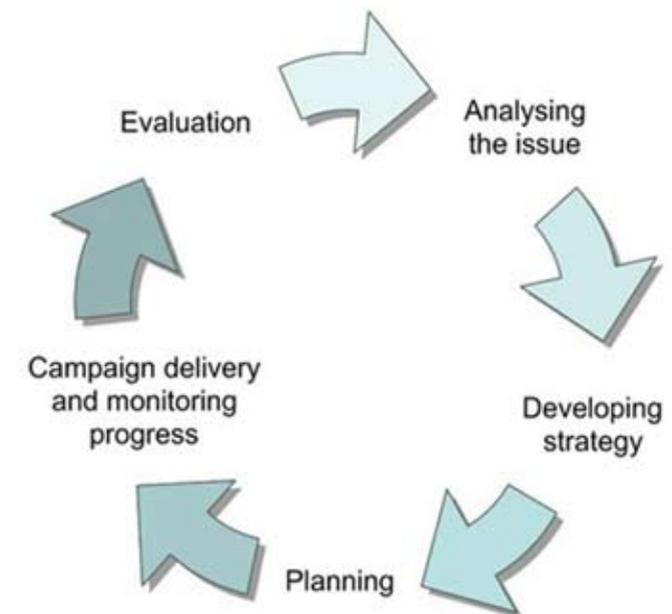
What is campaigning?

In the NCVO Good Campaigns Guide, campaigning is defined as:

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

Campaigning is the way that people, communities and organisations tackle inequality and injustice. Campaigners connect people’s everyday problems with political agendas. They stir people to action and show decision-makers how there are solutions to the problems they are highlighting. They can target politicians, civil servants, local councillors, directors of corporations or the courts, like Greenpeace’s Say No to a third runway at Heathrow campaign. Or their goal can be to influence the way the people across the wider population behave and think, such as the Fair Trade movement.

The classic campaign cycle shows how all aspects of campaigning activity relate to and are informed by each other.



<sup>1</sup> Adapted from the definition given by NCVO in *The Good Campaigns Guide 2005*

### Campaigning as a core activity

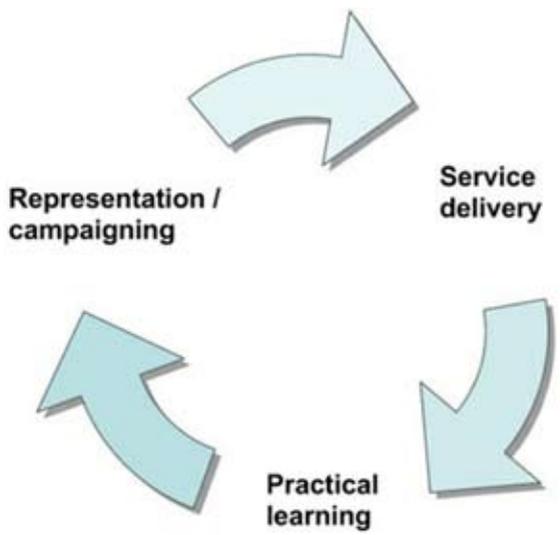
Campaigning is the activity you use to raise awareness of issues, redress any inequalities or protest against something that is being imposed on the people your organisation was set up to support. There have been changes made to charity law which mean that all charities now have a legal right to campaign on issues that fall within the scope of their overall vision. This has given many more charities the confidence to build campaigning into their core work.

### Campaigning to deliver your mission

All campaigns should fit with your organisation's mission and allow you to take public actions that express its values and purpose. If a campaign doesn't fit with your mission then it will be very difficult to make a case for your organisation's funders, staff, trustees, supporters and beneficiaries to back the campaign.

### Campaigning as part of service delivery

Organisations that provide services to people in need may identify particular issues affecting their beneficiaries and then run a campaign to help change those circumstances. Organisations such as Age UK and the National Autistic Society build their campaigns around gaps that they identify through delivering services to their beneficiaries. Two examples of this are Age UK's award-winning Hungry to be Heard campaign against hospital malnutrition for older people and the NAS's I Exist campaign that led to new legislation to protect public services for adults with autism. The diagram below illustrates the relationship between service delivery and campaigning.



### Campaigning and advocacy

Advocacy, sometimes known as voice, is a particular type of campaigning activity that gives representation to people and causes who don't have access to the forums where decisions affecting their lives are made. Charities, social enterprises, community and voluntary organisations can play a crucial role in representing people and causes to those that make the decisions. Or in supporting people to represent themselves by providing resources, training and access to decision-makers. Advocacy campaigns range from big international movements like Stop the Traffic against human trafficking practices through to campaigns membership organisations, like NCVO, run to support their particular members.

### Campaigning and democracy

Campaigns can help to keep important issues on the political agenda when they might otherwise be overlooked, ignored or dismissed. Used constructively, campaigning is crucial part of the checks and balances that should be part of a healthy democracy both at home and abroad. Organisations such as Liberty and Amnesty International campaign for freedom and human rights but campaigning for democracy can also take place at a local level, such as the Save the Veldrome campaign fighting against the closure of the 1948 Olympic Games cycling track in Herne Hill, south London.

### Campaigning and collaboration

Increasingly voluntary sector organisations are campaigning collaboratively to increase the impact they can have and to pool resources. The power of collaborative campaigns can be seen through examples such as Make Poverty History, the largest campaigning coalition of anti-poverty civil society organisations, and the Robin Hood Tax campaign, involving 60 voluntary sector organisations and unions joining forces to call for a global tax on banks.

### Getting campaigning right

Campaigning is a very important function for voluntary sector organisations to get right. People will often join a charity or send in donations off the back of a campaign. And it is through campaigns that people get to know about what a charity stands for and what it is trying to change. From improving the state of school dinners to tackling climate change, from local community campaigning to large-scale national campaigns, campaigning can bring the work of voluntary sector organisations to the attention of people who had not heard of your organisation or its cause before.

# Campaign stages

## Stage One: Setting your campaign objectives

### Know what you are campaigning on

#### Overview

Before you embark on any campaign you need to be confident about the need for your campaign. Campaigns are initiated for a variety of reasons but should link to the mission and values of your organisation (see page 08).

This stage will help you work out if your campaign is relevant and practical, if it is a legitimate issue for your organisation to campaign on and if the timing is right. It should also help you start to work out if your organisation has the resources to run the campaign and if there are partnerships and collaborations with other organisations that you should be exploring.

#### Main activities

- Make sure you are up to date with the background and environment of your campaign
- Identify whether the campaign is relevant to your organisation and the beneficiaries you support
- Identify if your campaign is legitimate based on the evidence you have available
- Identify if your campaign issues are being addressed by another organisation
- Identify the legal and regulatory constraints you will need to take into account
- Plot the timeframe for your campaign and identify any timings you need to factor in

#### Know and understand

- How to identify campaign issues
- The mission and values of your organisation
- How to determine campaign the potential results of campaigns
- The wider campaigning environment and how this impacts on your campaign
- How to consult with and involve the beneficiaries of your organisation
- The value of collaborative campaigning
- Different campaigning tactics and how to use different tactics to achieve different results

This section is based on the standard from the full National Occupational Standards for Campaigning called **Set objectives: Identify and prioritise issues on which to campaign.**

## Develop a vision

#### Overview

It is important for the vision to clearly describe what the world will look like when the campaign has achieved its aims. The vision describes how the campaign will make a difference and will help you decide if you are you trying to change people's behaviour or bring about a change in the law, for example. It unites everyone involved in the campaign - the people from your organisation, the external people and organisations you work with, and the people who support the campaign.

Your vision is also significant in helping you identify how your campaign might fit with other organisations' objectives and campaigns, or if there are any conflict of interests. So a campaign vision is important for understanding who your partners might be and where the opposition to your view might come from.

#### Main activities

- Determine clear aims and objectives for the campaign
- Identify stakeholders/organisations with sympathetic views and priorities

#### Know and understand

- The issue you are hoping to campaign on thoroughly and clearly
- How to assess what the campaign can realistically achieve
- The value of working with other organisations and consulting/involving beneficiaries
- The context of how the campaign fits with other organisations and ongoing campaigns
- The decision-making processes and how they can be influenced

This section is based on the standard from the full National Occupational Standards for Campaigning called **Set objectives: Develop a vision for the campaign.**

## Gather your evidence

#### Overview

You need to be able to say what the problem is and how it affects the people who you are campaigning for. Your research should provide evidence that there is a problem and that you are proposing a realistic solution.

Credible evidence and research is at the heart of any campaign. It is the foundation from which you will or will not be taken seriously by the people you are targeting to make changes and the people who support your campaign. It must be thorough, legitimise the cause and provide a way of measuring the progress you make towards achieving the campaign's goals. Supporters and decision-makers are not going to be persuaded by anecdote and opinion.

It is also important for running a successful campaign that the evidence gathering stage considers who it is that the campaign needs to influence. For example, politicians will be interested in both the national picture and how the problem affects their constituents, so they will need both national and local evidence. In other cases you may just need to present the local or national picture.

Ultimately, the evidence you gather must underpin the messages you convey during the campaign. And you must be able to trust it enough to use it to make ethical decisions about the campaign throughout its lifetime.

### Main activities

- Assess your organisation's capacity to conduct and/or commission research Analyse the research findings using appropriate tools and techniques
- Identify any gaps in the information you have that are relevant to your campaign
- Review your campaign aims against the findings of your research

### Know and understand

- Why it is important to set out clear aims for the research and how to develop a realistic research work plan
- Why it is important to be objective when carrying out research and how to be objective when presenting evidence
- The different methods for analysing relevant sources of research and how to assess if they are valid
- The techniques to analyse primary and secondary research and the value of each
- The techniques to analyse qualitative and quantitative data and the value of each
- How the research will contribute to and influence the direction of the campaign

This section is based on the standard from the full National Occupational Standards for Campaigning called **Set objectives: Carry out research for the campaign**.

## Stage two: Planning a campaign

### Develop a campaign strategy

#### Overview

A good strategy will set out your campaign objectives, who you need to target to bring about change and the tactics you will use to influence your targets, against the available budget. It should also help you plan your response to those who oppose your objectives and help you to decide how long your campaign will need to run for. Finally, a campaign strategy will set out how you will measure if the campaign has been a success.

A campaign strategy allows you to plan your campaign out in detail before you start the practical work. Through writing the campaign strategy you will be able to understand the resources – money, people, materials, time and services – you will need to secure before beginning the campaign.

Essentially, the campaign strategy is the glue that holds all the different parts of the campaign together. Once it has been agreed by and / or shared with all the partners responsible for running the campaign then everyone knows the overall objectives of the campaign and the plan they are working to. This helps keep the campaign focused and targeted throughout the time it runs.

#### Main activities

- Identify the strengths, weaknesses, opportunities and threats to your campaign
- Identify and analyse the target of your campaign, their decision-making powers and the ways in which you can influence them
- Identify potential allies, supporters and opponents of your campaign and opportunities to get them involved and win their support
- Agree your campaign message
- Establish tactics, methods and set a timeframe for delivering your campaign
- Identify how you will measure the success of your campaign

#### Know and understand

- Your campaign's aims and whom you need to target
- The external environment in which you will be campaigning
- The milestones you expect to see during your campaign
- Why it is important to monitor your campaign's progress
- The different ways in which you can communicate the campaign to your audience
- The arguments opposing your campaign
- Your budget and the resources required

This section is based on the standard from the full National Occupational Standards for Campaigning called **Be strategic: Develop a campaign strategy**.

## Identify your campaign resources

### Overview

Once you have worked out your campaign issue and vision, you can investigate who you may want to work with and what resources you will need. This is the point where you can map out the particular skills your campaign needs (see Skills and behaviours section on page 21) and whether or not you have all the skills needed within your organisation. If you are lacking key skills you will need to decide where you can get people with those skills. One way of doing this is to work with other organisations on a joint campaign.

Many campaigns are strengthened through strategic alliances as they allow organisations with similar objectives to combine resources and contacts to give a campaign more of an impact. Organisations working together can share intelligence, reach people one organisation would struggle to engage with and pool resources. Funders may also more willing to support campaigning work if you work collaboratively.

### Main activities

- Find out what the potential is for collaborative campaigning with other organisations or groups
- Work out what resources you have for your campaign (people and money) and any timelines that may be relevant
- Establish whether there are any legal or regulatory factors that you need to consider

### Know and understand

- How to measure the results of your campaign
- How your campaign fits into the vision, values and business plan of your organisation
- How your campaign will make a difference to the beneficiaries that your organisation supports
- What other campaigns are being run on the issue and how your campaign fits with them
- The different methods and activities you can use in your campaign and how you will assess if they are relevant to your aims
- The importance of the legal issues that affect your campaign and the rights of campaigners working on the issue
- The differences between proactive, strategic and reactive campaigning

This section is based on the standard from the full National Occupational Standards for Campaigning called **Be strategic: Obtain and manage resources for the campaign**.

## Develop a work plan

### Overview

Once you have identified your campaign issue, identified what resources you will need and any potential allies, then you need to stop and make sure that your planned campaign is actually workable. A work plan is your plan of action that sets out the particular campaign tactics you are going to use to achieve your objectives, when you will employ them and who is responsible for them.

Campaigns need to respond to changes. Either changes that result from your campaigning activities or events, either internal or external, that affect your campaign's objectives. It is important that your campaign action plan is a 'living document' that can be revisited and updated throughout the campaign as and when changes occur. An living work plan will allow you to adjust your activities in response to changes in your campaign's environment and will keep you in line with your campaign's objectives.

An effective work plan will be based on a risk assessment of the campaign and its environment. A risk assessment will allow you to monitor the threats and weaknesses you have identified and decided when you need to mitigate them by employing the campaign's opportunities and strengths.

### Main activities

- Establish which resources you require
- Identify the activities and tactics you will use to achieve the aims of your campaign
- Establish roles, responsibilities and timelines for completing tasks and activities
- Establish how you will monitor your campaign
- Ensure you have included time to carry out a risk assessment
- Review the work plan consistently throughout your campaign
- Identify and develop the ways you will communicate with the partners and stakeholders you are working with
- Set timelines next to all of the campaign activities
- Carry out a risk assessment using an appropriate tool, such as a SWOT analysis

### Know and understand

- The campaign vision
- Ways of campaigning to reach different audiences
- The order in which tasks and activities should be completed
- How to keep up to date with the issues that are relevant to your campaign
- How to conduct an effective risk assessment
- How to make sure there is continuity in the delivery of your campaign
- The resources for the campaign (both financial and non-financial)
- How to manage and motivate the campaign team - taking into account the different needs of paid and unpaid staff
- The training needs of the campaigning team

This section is based on the standard from the full National Occupational Standards for Campaigning called **Plan: Develop a campaign work plan**.

## Develop a campaign identity

### Overview

A strong identity is important to communicating a successful campaign. A campaign identity includes branding, key messages, slogans, language and tone of voice.

An effective campaign identity is based on understanding the target audiences – those people whom you want to support your campaign as well as those you wish to influence. If you understand who your target audiences are then you can develop strong campaign messages that resonate with and influence your supporters and the decision-makers you are trying to influence.

This phase of the campaign is important for planning the tactics you will use, how you will get your campaign messages out clearly and consistently and the timings for your campaign activities and messages.

This is one of the most important phases of any campaign because a strong campaign identity will determine how many people you reach and the impact you have. Getting the campaign identity right can be the difference between achieving your aim and your campaign failing to gain momentum.

### Main activities

- Describe clearly who your target audiences are
- Establish the identity of your campaign and the key messages you wish to communicate to your target audience
- Develop a strategy for communicating your campaign messages to your audience and the media (where appropriate)
- Where they differ, ensure that the brand of the organisation and the brand of the campaign remain distinctive
- Make sure information distributed about the campaign is clear, consistent, accurate and well-presented
- Monitor media coverage of your campaign and remain ready to respond to any publicity
- Select materials and use language which are appropriate for the target audiences
- Consult and commission people and/or other organisations that have experience of producing campaign materials for advice and practical support

## Know and understand

- How to develop coherent and consistent communication messages
- The importance of accuracy and clarity of language
- The vision and target audiences for the campaign
- The varying communication techniques appropriate to different audiences
- How to identify which campaign materials to produce (such as leaflets, briefings and reports)
- The importance of monitoring media coverage of your campaign
- How to deal with negative publicity and misinformation
- Your role in developing and producing of campaign materials

This section is based on the standard from the full National Occupational Standards for Campaigning called **Make it happen: Build the campaign identity and maintain its reputation.**

## Write a monitoring and evaluation framework

### Overview

Evaluation is key to any campaign and you need a monitoring framework to measure the impact of your campaign and to know if it has had the right effect. A good monitoring framework will set out clear targets that are mapped to the campaign objectives, as identified by your research. To be effective it is important that the targets in the monitoring framework are SMART (Specific, Measurable, Achievable, Realistic and have a Timeframe set against them).

Designing a monitoring and evaluation framework allows you to think in advance about who in the team is responsible for monitoring and evaluating the campaign, the types of evidence needed to make a robust assessment of the campaign's impact and how the evidence should be gathered.

It's important to monitor the campaign throughout its lifespan so you can review the progress of your campaign, what tactics are working to achieve your objectives and what activities are not furthering your objectives, and then adjust what you do accordingly.

### Main activities

- Decide at an early stage how the campaign will be monitored
- Establish a shared understanding within your organisation and your partners about what success means for this campaign
- Ensure you have all the resources you need to evaluate the campaign
- Decide what indicators and methods will help you measure your campaigns progress
- Set up systems to monitor the campaign, gathering data and any supporting information

### Main activities (continued)

- Set up and maintain campaign records
- Establish a timeline for monitoring the campaign and decide when you will produce progress reports
- Work out how your partners, staff and volunteers will contribute to the evaluation process
- Establish how you will present your findings
- Make sure you plan ahead so you can review the findings of your evaluation and act on the recommendations

### Know and understand

- What the campaign wants to achieve and the campaign vision
- The campaign milestones, activities and outputs
- The different methods for measuring the progress of your campaign
- How to establish appropriate processes and procedures for monitoring the campaign
- Other campaigns, past or present which may impact on the campaign
- Methods and techniques for analysing data
- How your organisation requires you to submit your report and to whom you should report the findings

This section is based on the standard from the full National Occupational Standards for Campaigning called **Plan: Design and develop a monitoring and evaluation framework for the campaign.**

## Stage three: Implementation

### Run the campaign

#### Overview

Running the campaign is the public phase of your campaign where you communicate directly with your supporters and the people you wish to influence. They will judge the success of your campaign on what you do in this phase. The time put into the earlier research and planning stages will provide a solid basis from which to run your campaign.

#### Main activities

- Make sure that your key activities correlate with those outlined in your work plan
- Make sure you record all the tactics that you use to reach your campaign goal
- Identify specific roles and responsibilities for everyone involved with the campaign and involve volunteers and other partners
- Build positive relationships with and among the campaign team

#### Know and understand

- The campaign work plan and its timescales
- The administrative and financial needs of the campaign
- How to work with a budget
- The roles and responsibilities of those involved with the campaign
- How to maintain accurate and up to date records
- The importance of maintaining confidentiality, where appropriate

This section is based on the standard from the full National Occupational Standards for Campaigning called **Make it happen: Administer and organise the campaign.**

## Build your campaign team and relationships

### Overview

Building your campaign team and nurturing external relationships is a key skill of a campaigner. A campaign team is likely to consist of a range of supporters, volunteers, people from partner organisations and people from your own organisation. You will also need to build relationships with the people who can help you reach and influence your targets such as local media, political allies, local decision-makers, researchers and people from other organisations working in the field.

It is very important to the success of a campaign that you are able to nurture your team and contacts. You need to know how to run a team and how to communicate effectively with stakeholders.

### Main activities

- Establish how much power and influence your allies, supporters and opponents have, particularly their influence on your campaign targets
- Keep partners and other relevant people informed of the campaign's progress and activities
- Use the skills and expertise of people in your campaign team, partners, supporters and the people who will benefit from your campaign
- Make sure that you encourage openness, fairness and co-operation
- Make sure you deal with grievances and manage conflicts appropriately

### Know and understand

- The campaign's aims and vision
- The importance of maintaining productive working relationships
- The environment in which your organisation campaigns
- Methods, opportunities and techniques to engage with people at all levels
- The people and/or communities your campaign will benefit - their needs and how they can help you
- Existing supporter groups and individuals who you can get involved in the campaign
- The importance of using networks to help spread campaign messages
- How to deal with the internal politics that arise when working with stakeholders and other allies

This section is based on the standards from the full National Occupational Standards for Campaigning called **Make it happen: Maintain relationships integral to the campaign** and **Make it happen: Mobilise the campaign team**.

## Produce campaign materials

### Overview

You will need a range of campaign materials to support the tactics you have chosen to use in your campaign. These might include printed materials such as leaflets, information packs and research reports. They also include electronic media such as online surveys, polls, dedicated websites, discussion forums, Facebook pages, Twitter feeds and e-bulletins. You may also want to get your campaign messages across using advertising, banners, costumes, badges, stickers, free gifts, etc. Usually the only limitation on your campaign materials is your budget.

It can be very expensive to produce the range of materials you would like for your campaign so you need to be clear about the objectives of the campaign and how each printed, electronic or other communication tactic will help you to achieve your aims.

### Main activities

- Establish the purpose and range of campaign materials
- Map the campaign materials against the campaign objectives
- Identify the range of materials you can afford and have the skills to produce
- Assess the impact of your chosen campaign materials
- Select materials that are appropriate for your intended audiences
- Involve other people and organisations in producing campaign materials
- Monitor the development and reach of the campaign materials
- Make sure there are enough campaign materials and that they are ready by the required deadlines

### Know and understand

- The campaign objectives
- The campaign budget and resources
- The purpose of the campaign materials
- How your target audiences are most likely to take notice of your campaign messages
- The accessibility needs of your target audiences
- The time it will take to produce all of your campaign materials

This section is based on the standard from the full National Occupational Standards for Campaigning called **Make it happen: Co-ordinate materials and products for the campaign**.

## Stage four: Measuring your impact

### Monitor and evaluate the campaign

#### Overview

Monitoring is very important to make decisions about whether you need to revise your work plan during the lifespan of the campaign. The evidence that you gather while monitoring your campaign will then allow you to evaluate the impact of your campaign and how efficiently and effectively you reached your objectives. Evaluation is particularly important in learning lessons and planning future campaigns.

Monitoring and evaluation runs throughout the implementation of your campaign and sometimes also carries on beyond the implementation stage if you need more evidence to carry out a robust evaluation.

It is critical that everyone in the campaign team understands the role they have in monitoring and evaluating the campaign and the evidence they should be collecting.

#### Main activities

- Make sufficient time available in the work plan to monitor your campaign and conduct an evaluation
- Keep up to date with and understand the external environment that affects your campaign
- Update information on identified risks at regular intervals during your campaign
- Identify where you need to make improvements in the way the campaign is being implemented
- Record key outcomes of the campaign and produce progress reports
- Analyse and review the information collected, using appropriate techniques
- Report and present the evaluation findings in a clear and accessible format
- Report the campaign's performance to relevant supporters and partners in an objective way
- Use the findings of the evaluation to plan next steps and inform future campaign activities, identifying the successes and lessons learned

#### Know and understand

- The campaign objectives and vision
- The campaign strategy and work plan
- The methods for assessing if the campaign has been effective
- Methods and techniques for analysing quantitative and qualitative data
- How to interpret the analysis to identify progress of your campaign
- How to establish appropriate processes and procedures for monitoring the campaign

#### Know and understand (continued)

- How to establish appropriate processes and procedures for evaluating the campaign
- The importance of objectivity in reporting
- How to deal with a shortfall in resources and running over budget
- How to involve stakeholders and beneficiaries in an evaluation
- How to use the different campaign documents to evaluate your campaign
- The evaluation plan and methods of reporting your findings to those to whom you are accountable
- The importance of learning lessons from current or previous campaigns to inform the campaign, or future campaign activities

This section is based on the standards from the full National Occupational Standards for Campaigning called **Analyse and evaluate: Monitor the campaign** and **Analyse and evaluate: Evaluate the campaign**.

## Skills and behaviour

People at all levels within an organisation may be involved in campaigning from high level, strategic and policy making functions carried out by people at director level to the supporting functions carried out by the people who assist the campaign.

To be a successful campaigner, at any level, there are particular skills and ways to behave that will help you plan, implement and evaluate your campaign. These will help you to carry out the activities listed in the campaigning stages above.

### Skills

The skills campaigners need are divided into three levels - assistant, officer and managerial level. The most basic skills are those that an assistant should have. Someone who is working at officer level should have all the skills of an assistant plus those of an officer, while a manager should possess all the skills described for each level.

#### Assistant

If you assist in campaign activities will need good organisational skills. This will include things like being able to manage your time well, working to deadlines, working in a team, paying close attention to detail and problem solving. You may also need specific skills in particular areas such as managing events or writing clearly.

#### Officer

If you are a campaigns officer then, in addition to the skills of an assistant, you will take more responsibility for the practical application of the campaign. Therefore you will need skills in tasks such as budget setting, control and reporting, as well as record keeping, risk analysis, strategic thinking, tactical planning, forward planning and project management. You will also have a greater involvement in the strategic success of the campaign so will need skills in critical thinking and analysis, and a range of interpersonal skills including the ability to encourage and motivate others, skills in engaging allies and the ability to manage 'complex' relationships. Finally, you will be playing a more 'hands-on' role in running the campaign so will need basic research skills and skills in interpreting and presenting data.

#### Manager

At managerial level the staff member or volunteer is ultimately responsible for the campaign so needs all the skills that assistants and officers have plus skills in leadership, negotiation and decision making. He or she needs good judgement and to know how to be accountable for their work and the work of the team.

## Behaviours

These are the ways of behaving which will help campaigners deliver successful campaigns. These include ways interacting with people well, such as by being approachable, empathic, persuasive, patient, pragmatic and supportive. Campaigners often need to change and adapt their plans as the campaign progresses so campaigners also need to be flexible, adaptable, open-minded, creative and innovative. The changing nature of campaigns can make the working environment uncomfortable for some people. However, if you are someone who is optimistic, passionate, finds it easy to motivate themselves and are practical, realistic and resilient, then you are more likely to adapt well to that aspect of campaigning. The strength of a campaign also relies heavily on its integrity, so good campaigners need to be honest, ethical, focused, enthusiastic, objective, impartial and thorough.

If these are the approaches that you take to your work then campaigning should be a role that you enjoy.

# National Occupational Standards for Campaigning

The full National Occupational Standards for Campaigning set out the performance criteria, behaviours, and knowledge and understanding under the following headings. Each heading covers an Occupational Standard and the Units that make up that Occupational Standard. In this guide some of the Occupational Standards have been combined to avoid too much repetition. However, if you are using National Occupational Standards to develop qualifications you will need to refer to the full National Occupational Standards for Campaigning at [www.skills-thirdsector.org.uk/documents/Campaigning-Standards.pdf](http://www.skills-thirdsector.org.uk/documents/Campaigning-Standards.pdf). You may also find it helpful to cross-reference the full National Occupational Standards if you are using Standards for HR purposes, such as to draw up job descriptions and for appraisals.

The full National Occupational Standards are set out under the following headings. Each heading describes one of the Occupational Standards within the full National Occupational Standards for Campaigning.

## Set objectives

- Identify and prioritise issues on which to campaign
- Develop a vision for the campaign
- Carry out research on the campaign issue

## Be strategic

- Develop a campaign strategy
- Obtain and manage resources for the campaign

## Plan

- Develop a campaign work plan
- Design and develop a monitoring and evaluation framework for the campaign

## Make it happen

- Build the campaign identity and maintain its reputation.
- Maintain relationships integral to the campaign
- Administer and organise the campaign
- Mobilise the campaign team
- Coordinate materials and products for the campaign

## Analyse and evaluate

- Monitor the campaign
- Evaluate the campaign

You can use the National Occupational Standards for Campaigning in conjunction with other National Occupational Standards depending on the scope and responsibilities a member of staff or volunteer has. Some of the National Occupational Standards Skills - Third Sector publishes that you might be interested in include:

- fundraising
- managing volunteers
- monitoring and evaluation

Skills organisations publish other National Occupational Standards covering additional aspects of the campaigning role such as:

- administration
- management and leadership
- IT

## Using National Occupational Standards

National Occupational Standards are agreed by people who have direct experience of doing a particular job. They set out the skills and knowledge that employers, practitioners and volunteers agree are needed to do that particular role well. They set the nationally agreed standards for that role. There are National Occupational Standards covering all sorts of jobs in the voluntary sector and other sectors of employment and business.

They are a useful tool for making sure the job descriptions, roles and responsibilities and appraisals relate to those nationally agreed standards. They are also useful for identifying in which areas someone needs to develop their skills and knowledge so they can do their job to the nationally agreed standard. While training providers and people offering informal skills and knowledge development can use them to plan their training and learning so that it is relevant to the nationally agreed standard.

### Who can use National Occupational Standards?

Staff and volunteers can use National Occupational Standards to:

- Measure their performance, knowledge and understanding against a nationally agreed checklist
- Identify where they need to develop their skills, knowledge and understanding
- Help them decide what skills, knowledge and understanding they will need to progress their career

HR staff and line managers can use National Occupational Standards to:

- Design fair and transparent recruitment and selection procedures
- Design job descriptions, advertisements and interview questions
- Design induction programmes and information packs
- Carry out appraisals
- Identify individual or team learning needs

Training providers can use National Occupational Standards to:

- Make training programmes more relevant to people's needs
- Provide clear goals for structured learning
- Design tailored training packages and assess relevance and effectiveness courses
- Define the learning outcomes

Other people within a third sector organisation can use National Occupational Standards to:

- Help with strategic planning
- Develop resources that are benchmarked to nationally recognised best practice
- Contribute evidence to the organisation's quality systems

### Where do I start?

To get started, you need to identify which National Occupational Standards are relevant to your organisation and the people in your organisation.

Skills - Third Sector has responsibility for developing National Occupational Standards for jobs that are found predominantly, but not exclusively, in voluntary sector organisations available from [www.skills-thirdsector.org.uk](http://www.skills-thirdsector.org.uk). These include:

- campaigning
- fundraising
- trusteeship
- development work
- volunteer management
- monitoring and evaluation

Other skills bodies hold National Occupational Standards for other roles found in some charities such as counselling, guidance and advocacy, childcare, administration and IT. Copies of all standards are available from [www.ukstandards.org.uk](http://www.ukstandards.org.uk)

Once you have copies of the relevant National Occupational Standards, you need to work with staff and volunteers within your organisation to identify which Standards relevant to their job roles.

You may need to look in different National Occupational Standards to cover all aspects of a role. For example, someone responsible for campaigning will find most of what they do in the National Occupational Standards for Campaigning but may also use some of the Occupational Standards in within the National Occupational Standards for Volunteer Management.

Once you have identified the relevant units from the National Occupational Standards you can use those to carry out the HR tasks listed above.

## Glossary

### Aim

The overall purpose of your campaign. Sometimes also known as the campaign goal.

### Beneficiaries

Anyone – or anything – that may benefit from the campaign and/or its positive outcomes. Not all campaigns will be able to identify or engage with their beneficiaries as the aim maybe too wide.

### Campaign cycle

A framework for managing the different stages in the lifetime of a campaign.

### Campaigning

The mobilising of forces to influence others in order to effect an identified and desired social, economic, environmental or political change.

### Campaigns

Organised actions around a specific issue seeking to bring about changes in the policy and behaviours of institutions and/or specific public organisations or bodies.

### Coalition

A group of people or organisations that you work with during your campaign to achieve the campaigns aims.

### Decision-makers

Individuals in power (often in government) that have the authority to make decisions which can impact your campaign.

### Evaluation

An analysis and assessment of the performance of your campaign against its objectives.

### Inputs

Resources used in delivering the campaign.

### Impact

The significant or lasting changes in people's lives that result from a particular course of action.

### Key messages

The key messages about your campaign that you communicate to your supporters and the people you want to influence.

### Monitoring

The ongoing process of gathering information on the progress of the campaign towards the achievement of its objectives.

### National Occupational Standards

National Occupational Standards are the descriptions of the skills that someone needs to be a good campaigner as agreed by people who have experience of running campaigns in the voluntary sector.

### Objectives

The desired results that will lead to the achievement of the campaign aim.

### Outcomes

The effect of your outputs (see below) and the changes it has brought/helped to bring about.

### Outputs/tactics

Events or activities that you organise as part of your campaign (e.g. a meeting with officials or an event which you organise as part of your campaign).

### Stakeholders

An individual or organisation with legitimate interest in your campaign - that you engage with prior to and during your campaign. This may include trustees, directors, partner organisations, beneficiaries, funders, donors, politicians, government bodies and the media.

### Target

The individual or group you focus upon to achieve the campaigns aim (e.g. a government minister, department or a local authority).

## Further information

### Resources

The Good Campaigns Guide  
Kingham T & Coe J (2005)  
NCVO, London  
£25 (£17.50 for NCVO members)

The Good Guide to Campaigning & Influencing  
Lamb B (2010)  
NCVO, London  
£25 (£17.50 for NCVO members)

Is your Campaign Making a Difference?  
Coe J & Mayne R (2008)  
NCVO, London  
£25 (£17.50 for NCVO members)

CC9 - Speaking Out: Guidance on Campaigning and Political Activity by Charities  
Charity Commission (2008), London  
Download: <http://www.charitycommission.gov.uk/publications/cc9.aspx>

### Training

#### Certificate of Professional Practice in Campaigning

A 10 module course in campaigning accredited by Roehampton University  
National Council of Voluntary Organisations (NCVO)  
020 7713 2505  
[campaigning@ncvo-vol.org.uk](mailto:campaigning@ncvo-vol.org.uk)

#### Campaigning and Lobbying

A training course to enable participants to effectively lobby national politicians and their advisers and build participants' skills in campaigning.  
Directory of Social Change (DSC)  
08450 77 77 07  
[training@dsc.org.uk](mailto:training@dsc.org.uk)

#### Influencing Policymakers

A training course to increase participants confidence and develop key skills for understanding and influencing policy makers.  
Directory of Social Change (DSC)  
08450 77 77 07

## Contacts

### National Council of Voluntary Organisations (NCVO)

Regent's Wharf  
8 All Saints Street  
London N1 9RL  
020 7713 6161  
[campaigning@ncvo-vol.org.uk](mailto:campaigning@ncvo-vol.org.uk)  
[www.ncvo-vol.org.uk/campaigningeffectiveness](http://www.ncvo-vol.org.uk/campaigningeffectiveness)  
[www.ncvo-vol.org.uk](http://www.ncvo-vol.org.uk)

Founded in 1919, NCVO is the largest umbrella body for the voluntary and community sector. It gives advice, voice and support to civil society throughout the UK.

### Directory of Social Change (DSC)

24 Stephenson Way  
London NW1 2DP  
020 7391 4800  
[training@dsc.org.uk](mailto:training@dsc.org.uk)  
[www.dsc.org.uk](http://www.dsc.org.uk)

Directory of Social Change (DSC) is a leading source of information and training (on fundraising, management, organisational, personal development, communication, finance and law) to the voluntary and community sector in the UK.

### The Sheila McKechnie Foundation (SMK)

The Resource Centre  
356 Holloway Road  
London N7 6PA  
020 7700 8231  
[info@smk.org.uk](mailto:info@smk.org.uk)  
[www.smk.org.uk](http://www.smk.org.uk)

Set up in memory of Dame Sheila McKechnie, SMK is entirely dedicated to helping campaigners create positive and lasting social change.

### Media Trust

2nd Floor  
157-161 Riverwalk House  
Millbank  
London SW1P 4RR  
020 7217 3717  
info@mediatrust.org  
www.mediatrust.org

The Media Trust works with media organisations and charities to enhance their communications and enable communities to find their voice and make it heard.

### Workforce Development

NCVO, Regent's Wharf  
8 All Saints Street  
London N1 9RL  
020 7713 6161  
ncvo@ncvo-vol.org.uk  
www.ncvo-vol.org.uk/advice-support/workforce-development  
www.ncvo-vol.org.uk

NCVO's Workforce Development team provides advice and support to voluntary and community organisations to help them recruit, retain and develop their workforce.

### Skills – Third Sector

The Circle  
33 Rockingham Lane  
Sheffield S1 4FW  
0845 450 3860  
info@skills-thirdsector.org.uk  
www.skills-thirdsector.org.uk

Skills - Third Sector makes it easier for charities and social enterprises to have people with the right skills by publishing information and guidance, carrying out research and consultations, and making the case to government and others for why skills matter to voluntary sector organisations.

“This valuable guide offers practical information in a very straightforward, logical manner about the standards that competent campaigners should be working to and the importance of doing things in the right order. It should be required reading for anyone interested in a career in campaigning, and for everyone who wants to make their campaigns more effective.”

*Ray Mitchell, Head of Campaigns, Age UK*



Skills – Third Sector makes it easier for people in charities and social enterprises to have the right skills to make a difference to people and their communities.

We provide information and resources on skills, qualifications and learning for people who work, volunteer and manage third sector organisations.

[info@skills-thirdsector.org.uk](mailto:info@skills-thirdsector.org.uk)  
[www.skills-thirdsector.org.uk](http://www.skills-thirdsector.org.uk)  
0845 450 3860

Skills – Third Sector  
The Circle  
33 Rockingham Lane  
Sheffield S1 4FW

Charity no: 1132476