



Forum Resource Manual



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Section 1

Introduction

Age Cymru

Age Cymru is the national charity for older people in Wales.

More than ever before, older people are facing some of the hardest challenges imaginable. Some live in poverty or can't get the basic care they need to live with dignity. Sadly, older people often have to face these issues with no-one to help or support them – loneliness is a daily struggle when you only have the TV or radio for company.

That's why Age Cymru is here. Our vision is a society which offers all people in Wales the best experience of later life. Older people are valued, included and able to shape decisions affecting their lives.

Our mission is to improve the lives of older people by delivering trusted advice, support and services. We use our knowledge, insight and experience to influence policies and decisions affecting older people.

- **We are here for older people when they need us.**
- **We provide information and advice.**
- **We deliver wellbeing programmes.**
- **We provide independent advocacy.**
- **We support carers.**
- **We campaign and research.**
- **We work with our local partners and older people's organisations.**

Definition of a forum

Older people's forums are a means of enabling older people and their organisations to meet together at a local level, share their views, develop their own agenda and influence their own environment. Forums identify the issues that their members are most concerned about and work to improve local services across the statutory, voluntary and private sectors. They're concerned with all issues that affect the quality of life of older people in their local authority area.

Forums offer a valuable source of advice and consultation to local authorities and to health bodies on older people's issues. Many of them are involved in formal consultation mechanisms with these bodies. Forums are also campaigning organisations, trying to get public authorities to pay attention to the issues they consider important to them.

Older people's forums are:

- independent organisations offering an independent voice
- run by older people for older people
- directly representative of the views of older people – not mediated through another body
- non-party political, and
- self-directing; they decide their own agenda and take up issues at a local, regional and national level.

How to use this manual

For ease of use, the manual is presented in the following sections:

Section 1 describes the background of the forum movement and its development in Wales

Section 2 provides information and advice on both setting up and running a successful forum

Section 3 offers practical advice on issue-raising.

The manual has been designed for all forums, whether you're just starting out or are established but want to continue developing.

Each of the chapters in each section can be used independently and most of the time you will probably be dipping into the parts you need. However, please bear in mind that each chapter directly relates to the others.

We'd encourage you to take your time reading the toolkit and use the methods you feel most happy with.



Section 2

Tools of the Trade

Before you start...anything

Plan, prioritise, act, evaluate

The work that forums undertake can be diverse and time-consuming; it's for that reason you need to be organised and get as many 'hits' out of one piece of work as you can.

First, you need to be clear about what is forum work and what isn't. It's very easy to spend a lot of time on social events but do they all comply with the objectives in your constitution?

Secondly, you need to work out the implications of any plans you have. Be strategic; there's no point in organising a mass petition if you don't have the funds for the paper or printing, or if someone else is already petitioning on the same issue.

In practice, what does this mean?

Many forums hold open days, produce newsletters, initiate petitions, conduct research, write press releases and apply for funds.

For all these actions you need to ask yourself the following questions:

- **What do we want to do?**
- **Why do we want to do it?**
- **Who is going to do it and can we clearly identify any partner?**
- **Where are we going to do it?**
- **When are we going to do it?**
- **How are we going to do it?**
- **How much is it going to cost?**
- **How long is it going to take?**
- **How will we know if it has been a success?**
- **Do we need any equipment to do it?**
- **Are there any other opportunities resulting from this piece of work?**

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We've listed a few examples for you on how to translate these questions into an action plan. We'd recommend that for any activity the forum undertakes you should invest a little time answering these questions. You'll find that it will save you time in the long term and that it'll also give you an easy-to-follow plan, clarity of purpose and identified tasks.

As you start to answer the questions you may need to add to answers as further needs, opportunities, costs, etc become apparent.

Template action plan

Name of plan (what we want to do):		
What needs to be done? 1. 2. 3. 4. 5. 6. 7. 8.	By whom?	By when?
Costs 1. 2. 3. 4. 5. 6. 7. 8.		
Press		
Partners		
Promotion Social Media Printed promotion		

Section 2: Tools of the Trade

Starting up

Older people's forums are continuing to change and develop across Wales. Forums enable older people to share views, raise concerns and allow voices to be heard in the planning and provision of local, regional and national services and facilities, and help to bring about change.

They have a variety of names and structures but share common features:

- all are run by older people for older people
- all older people in the area can take part (forums are inclusive)
- they're independent organisations with a constitution
- they're non-party political
- they decide their own agenda and can take up issues at local, regional or national level.

Forums can be set up by older people acting by themselves or with the support of other agencies. Forums can exist at a very local level, representing just a few streets, or they can cover a town or city. In some cases there is an umbrella forum which covers a larger area like an entire local authority area. They have a democratic structure with a committee that meets regularly.

Open meetings are held regularly. Frequently a speaker is invited to talk about a topic of interest. Meetings provide an opportunity for people to meet other like-minded people. Often, refreshments are offered.

Some forums produce a newsletter which enables them to reach people who can't attend meetings or aren't members of the forum. The newsletter can inform people about the forum's successes and about any changes to local or national services or policies; it can also encourage readers to raise issues of concern, or to feed back their views on a subject.



Getting started

There are some steps that need to be taken when setting up an independent forum.

Initial meetings with people interested in starting a forum

At this stage, there are a few things you need to discuss and agree:

- the area covered by the forum (neighbourhood, scheme/estate, ward, local authority area)
- membership of the forum (individuals, organisations, or both)
- planning and publicising an open meeting

Plan an open meeting

This is to attract more older people in your area who might be interested in getting involved. You need to agree an action plan, including:

- an accessible venue
- publicity (flyers, posters, press releases, social media)
- possible speakers (local councillors, your MS, representatives from other forums in the area)

You can get support to organise your open meeting from COPA, the local voluntary council or your local authority.

Hold an open meeting

Make sure that you do the following on the day:

- ensure that everyone fills in the attendance sheet so that you can keep them informed of progress
- appoint someone to record the meeting
- note all the issues of concern that are raised
- elect a steering committee

Form a steering committee

This committee doesn't have to be the permanent committee, but you will need to complete the following:

- agree on the forum's name
- draft a constitution
- produce job descriptions for the officers
- identify the issues of interest
- start planning your first campaign
- plan the forum's launch
- keep people informed of your progress
- make sure everyone knows who you are and how to contact you

Launch the forum

You might like to launch your new forum with your first AGM so that you can officially adopt a constitution and any other documents that the steering committee has produced.

Organising and promoting a public meeting

When you're ready to start your forum, the first public meeting will be crucial; a properly organised meeting will attract wide interest and help you to set up a group which will campaign for older people's rights. It will also provide a good basis for your future public meetings. If you organise carefully and thoroughly, your meeting will be a success.

Section 2: Tools of the Trade

Format of the meeting

The following suggestions should ensure that your meeting goes well.

- Hold your meeting during the day, as older people generally prefer daytime meetings to evening ones.
- Consider holding your meeting over two hours in the morning, as some older people attend other clubs and meetings in the afternoon or over lunch.
- Make sure that you organise the meeting into smaller groups at some point so that people have the opportunity to raise the issues they feel strongly about. Ensure that you have a note of these discussions, so you can consider how to deal with the issues at a later stage.
- Consider inviting a guest speaker and make sure that attendees are able to ask questions.

Every meeting should have an agenda, so that there is some structure to your forum's work.

Meeting agenda

An agenda is simply a list of activities that need to be considered at a meeting and decisions taken on what actions need to be taken. It also provides a framework for reports on progress and actions already undertaken.

Here is a sample agenda for an open meeting:

Agenda

1. Apologies for absence
2. Welcome and introductions
3. Background to the meeting
4. Information on what a forum is and what it can achieve
5. Open discussion on issues
6. Next steps
7. Date/time venue of the next meeting



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Promotion and publicity

A successful public meeting needs good publicity. This can include:

Leaflets should be short and interesting - try to inform without boring your reader. Circulating leaflets can be quite an effort so try sending them to existing older people's groups and handing them out in places you know older people like to meet. You could also hand leaflets out in the local shopping area (check with your local authority) and your local supermarket (seek permission from the manager first).

Posters should grab attention and give information - try to make them eye-catching. A4 size suits most notice boards and will fit easily into envelopes. If possible, create the poster on a computer and consider printing it on coloured paper to make it stand out. Don't include too much information - you only need enough information to ensure that people will attend your meeting. Ask to display your posters at local shops, the post office, library, church halls, GP surgeries, chemists, pubs and anywhere you think older people might see it.

Media Ask your local newspaper to publish an article about your event. If that isn't possible, consider an advert. It's also worth approaching local radio stations with information about your event. Make sure you have someone who's prepared to speak to the press and knows what to say.

Social media can be very useful for promoting events. Make sure everyone involved in your event posts information on their own social media accounts (if they have them) and ask local Facebook and Nextdoor groups to post about your event. Ask your local councillors and your MS to promote the event on their social media.

Public meeting checklist

- **Speaker(s) invited and confirmed**
- **Venue accessible**
- **Venue booked**
- **Posters and leaflets distributed**
- **Local media informed**
- **Social media posts**
- **Refreshments organised**
- **Attendance sheet supplied**
- **Volunteers to facilitate group**



Practical arrangements

You'll need some funding 'up front' in order to hold your first open meeting unless you're lucky enough to have some contacts who are willing to help for no charge.

Where to hold the meeting

Ideally, the venue you use for the meeting should be central to your neighbourhood. The building should be easily accessible by foot and public transport. The meeting should be held on the ground floor, unless there is a lift, and the room you are using should be wheelchair accessible. If you have a local community centre, there may be no charge. Your local voluntary council will be able to help you find a venue and many have rooms that you can hire for a reasonable price. It's also worth speaking to your council, as you may be able to use a meeting room in one of their properties. Make sure the room you use is big enough to accommodate up to 30 people, just to be sure.

Refreshments are essential

If your meeting is only going to last two hours, organise tea, coffee and biscuits. If you plan to go on longer, consider organising a lunch. This doesn't have to be expensive – some supermarkets and bakeries can provide sandwich platters for a reasonable cost. Don't forget to mention the refreshments on your publicity.

Transport

It's very important to give this some thought. Use your local community transport bus or contact your local community worker about using a council vehicle. Encourage people to make their own transport arrangements, but make sure you're in a position to support those who need it and that you are able to meet the costs. Advertise that you can help with transport in your publicity and include contact details for those who need transport.

Next steps

If all goes well at the public meeting, you should now be at the point where you can take the next steps in establishing your forum. This is often a crucial stage – a clear sense of purpose will be needed, as there'll be many decisions to make that'll determine the group's progress. Having a strong steering committee will pay dividends.

Don't be put off if the numbers of members is relatively small to start with or if there's an apparent lack of experience. Help, support and advice is available and some of the largest and strongest forums have grown from small beginnings.



Section 2: Tools of the Trade

Constitution

All forums must have a constitution. A constitution is simply a set of agreed rules governing how a forum will be run, how the members will work together and what they are working towards. It sets out the way that the officers are appointed, the organisation's aims and objectives and the powers that the forum is able to exercise in pursuit of its goals.

You will need a constitution to open a bank account. A constitution ensures that the public and funding bodies can feel confident that a forum is being run and its money managed properly.

While sample constitutions are available, it's difficult to take a 'one size fits all' approach to producing one. It's worth taking advice on the type of constitution that would be best for your needs.

Information and advice are available from Cymru Older People's Alliance (COPA), your local voluntary council, the Charity Commission, and a number of websites.

In addition to providing template constitutions, The Charity Commission can also provide advice on becoming a registered charity, which can open up more funding opportunities for your forum.



Committee roles and responsibilities

What are committees?

To run your forum successfully, you'll need an effective committee. Committees are simply mechanisms for bringing people together to consider problems and make decisions. Central and local government are based on committee structures. Public bodies, charities and voluntary organisations are headed by committees of some kind. Trades unions are run through branch meetings, executive committees, and general meetings.

Committees need rules which establish structures and formal procedures. In some organisations, these rules are set down in constitutions, rule books or standing orders, but many organisations adopt the conventions almost subconsciously.

The rules and conventions can be applied in widely different ways. One meeting may work entirely through formal resolutions, set speeches, written reports and recommendations from committees or sub-committees with formal votes. The person who is chairing the meeting acts almost like a judge and everyone speaks with self-conscious formality. Another meeting may take a fairly informal approach in which discussions lead to a consensus about what to do. Perhaps only if there's been a sharp disagreement would this type of group adopt a more formal style and take a vote on a motion or proposal. None the less, the group has a structure and a code of behaviour based on established conventions for the conduct of meetings and committees.

Procedures can sound pompous and unnecessary but they supply a structure that can be relied on when conversation and argument have been exhausted.

To make decisions, a committee needs the chair to have authority and respect, it needs a clear order of business sub-divided so that committee members have proposals to deal with, and it requires a written record of its decisions.

The purpose of a committee meeting is:

- to decide what action to take
- to come to a decision which is accepted as legitimate
- to benefit from the ideas, skills, knowledge and opinions of the members present
- to conduct business efficiently, in good time and in accordance with the objects in its constitution.

Committee meetings should be regarded as confidential, even if it's not been mentioned. Information should only be shared with the authorisation of the committee.



Finding committee members

Committee members should be nominated for the following types of reasons:

- they're committed to the goals of the organisation
- they have the time and interest to devote to the committee and the associated responsibilities
- they have knowledge or talents appropriate to the particular committee
- they've taken an interest in the organisation and have expressed an interest in joining the committee.

The selection of committee members in reality rarely takes place. All too often, individuals are 'volunteered' by the committee, which means that individuals can be nominated for the wrong reasons, such as:

- they have plenty of spare time
- they'll agree with the chair or committee members
- they're friendly with the chair or committee members.

Such reasons often occur because the committee doesn't have a definite policy or procedure on the selection of members.

Briefing and training of committee members

An appropriate and effective selection of committee members isn't sufficient to ensure that members will be ready to take on the responsibilities required of them, or that they'll act competently in meetings. Between selection and their first attendance, new committee members should receive a briefing and possibly some induction training.

This could include:

- an informal meeting with the chair and secretary
- information about the committee's current work
- background information on the responsibilities of the committee and what their responsibilities will be
- the roles of the other committee members
- an informal gathering of the whole committee to provide an opportunity for members to get to know each other outside the formal environment of meetings.

A well-prepared and well-briefed committee member is more likely to participate effectively in meetings.

The first meeting for a new member can be a difficult one but with real support and guidance it can be made easier. Careful selection and a thorough briefing make it possible for committees to operate effectively.



Being a good committee member

Whatever the organisation, certain skills are required of committee members if they're to play an active role at meetings. To be an effective member, requires commitment and skills that have to be learned.

An effective, responsible committee member is:

1. regular in attendance at meetings and arrives punctually
2. well-prepared and arrives at meetings with the agenda and relevant papers
3. able to contribute to discussion in a relevant and constructive way
4. well-briefed and well-informed about the various items on the agenda, prepared to take the lead occasionally on particular topics
5. assertive without being aggressive – prepared to give an opinion or state a point of view without being domineering
6. mindful of the objectives of the committee and willing to keep to the formal agenda
7. supportive of other members of the committee, in particular the chair
8. an attentive listener, whatever the item under discussion, and always willing to consider the views of others.

Committee roles and responsibilities

The Chair

The qualities for effective chairing aren't easy to define. At times, the role can be difficult but with support from the committee, it's rewarding and never boring.

General responsibilities

1. To ensure the organisation does the work that it was set up to do
2. To liaise closely with the Secretary about dates, arrangements and agendas for meetings
3. To chair and ensure the meetings run smoothly
4. To be the spokesperson for the organisation, and between meetings the official voice of the organisation
5. To take the lead on public relations for the organisation.



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Role at committee meetings

1. Arrive early for meetings, as members may wish to speak to them beforehand
2. Start the meeting on time, allow reasonable time for each item on the agenda and ensure that time limits are observed
3. Facilitate discussion during the meeting, encouraging all members to participate
4. Bring each agenda item to a conclusion by briefly reviewing the points
5. Ensure all members understand any proposal prior to voting
6. If a vote has to be taken, clarify the voting procedure and enact the procedure. In the event of a tie, the Chair has the casting vote
7. At the close of the meeting, fix arrangements for the next meeting and liaise with the Secretary on actions resulting from the meeting.

Good committee management doesn't simply depend on carrying out your responsibilities to the letter.

A good Chair:

- must be well-prepared before the meeting and be forewarned of possible controversial or delicate items on the agenda
- should always appreciate that their own opinions should be voiced to a much lesser degree than those of other committee members
- must know all committee members well and be able to recognise the 'strong' and 'quiet' among them. It's their responsibility to put new members at ease at their first meeting and to encourage participation by all
- will know the goals for each meeting, will not allow time to be wasted, develop a sensitivity as to when discussion is no longer fruitful and when to bring it to a conclusion
- sets the tone and style of an organisation – they are normally the most quoted and have the highest profile, often personifying the organisation.

Some organisations have a Vice-chair to carry out the role of the Chair in their absence.



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The Secretary

The position of Secretary can be the most interesting and rewarding office on a committee. If you have a good Secretary, appreciate that person – you have struck lucky.

General responsibilities

- Keeping a record of all the proceedings of the forum
- Keeping all committee reports on file
- Keeping the forum's official membership list up to date and stored securely
- Communicating with forum members
- Taking the minutes and making them available to forum members on request
- Maintaining record books where the constitution, rules and minutes are entered with any amendments properly recorded
- Sending out notices of each meeting to the membership
- Conducting the general correspondence of the forum
- Preparing the agenda for meetings with the Chair

Before meetings

- Check with the Chair and through the minutes of the previous meeting that all action points have been carried out by agreed dates
- Consult the Chair and the Treasurer as to any business they would like included on the agenda
- Consider agenda suggestions or comments from other committee members
- Post or email a notice of the meeting and the agenda with related paperwork to all members, to reach them about a week before the meeting
- Ensure the meeting venue and any refreshments are booked

During meetings

- Record the names of all those present and check that a quorum is present
- Bring extra copies of the agenda
- Bring all correspondence and related paperwork
- Take minutes
- Make sure all decisions are clearly noted, make a note of who is going to do which job and when they have agreed to complete them
- Have copies of minutes from previous meetings in case the committee needs to refer to them

After the meetings

- Draft the minutes as soon as possible and submit to the Chair for approval before circulating them to the committee
- Write letters, obtain information or take actions on matters decided by the committee, as appropriate
- Ensure that there's an approved and signed copy of the previous meeting's minutes and that it's filed

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Correspondence and records

- Note all correspondence, both in and out, on the agenda
- Take the correspondence to the meeting for discussion or if it's of significant importance, send copies by post or email with the agenda
- Don't file current correspondence until after the committee has approved both inward and outgoing mail
- Old correspondence regarding dates of meetings, apologies for absence, etc. can be discarded after one year
- After two years, correspondence regarding events, awards or policy can be discarded
- Any correspondence relating to constitutional, matters or internal management should be stored safely and not destroyed

Minute books and files

- Minutes can be taken by the Secretary or by someone with the specific role of Minutes Secretary
- Always keep minutes securely and never destroy old copies or files
- If the forum's business is carried out electronically, save all documents in a secure file, but keep hard copy records in a safe place as well

Other responsibilities

- Prepare the Secretary's annual report
- Make arrangements for the Annual General Meeting
- Obtain nominations for people wanting to become officers and committee members for the following year
- Send reports of meetings or campaigns to the press, unless the forum has a dedicated Publicity Officer

The agenda

The agenda is a list of things to be done, a programme of business for the meeting. It's normally drafted by the Secretary in consultation with the Chair and is then circulated to the members of the committee before the meeting, together with any other papers which may be required.

There's a convention that the first and last two items recur automatically on each agenda. Apologies for absence and minutes of the last meeting usually go first, while the final two items will be any other business and date of the last meeting.

Between these set opening and closing items are the other subjects that require the committee's attention. Many of these items will be set by the minutes of the previous meeting. It's almost certain that some action will have been agreed and members been given responsibility for actions must be given the opportunity to report their progress. Reports are sometimes sent to committee members with the agenda – this can save time if there's a large agenda to cover.

In the interval between meetings, items for the next agenda will come to the attention of the secretary. Members of the committee may ask for some topics to be included on the agenda. Others will occur to the secretary in the course of the committee's work.

It's advisable to put straightforward items at the beginning of the agenda, given that they can be dealt with quickly, leaving the remaining time for topics needing detailed discussion.

It's fairly common practice to place 'matters arising from the minutes' as the third item on the agenda. The purpose is to tell committee members of developments arising out of previous business when it isn't necessary to include them as an item on the agenda.

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However, 'matters arising' needs to be strictly controlled, as it has three major disadvantages:

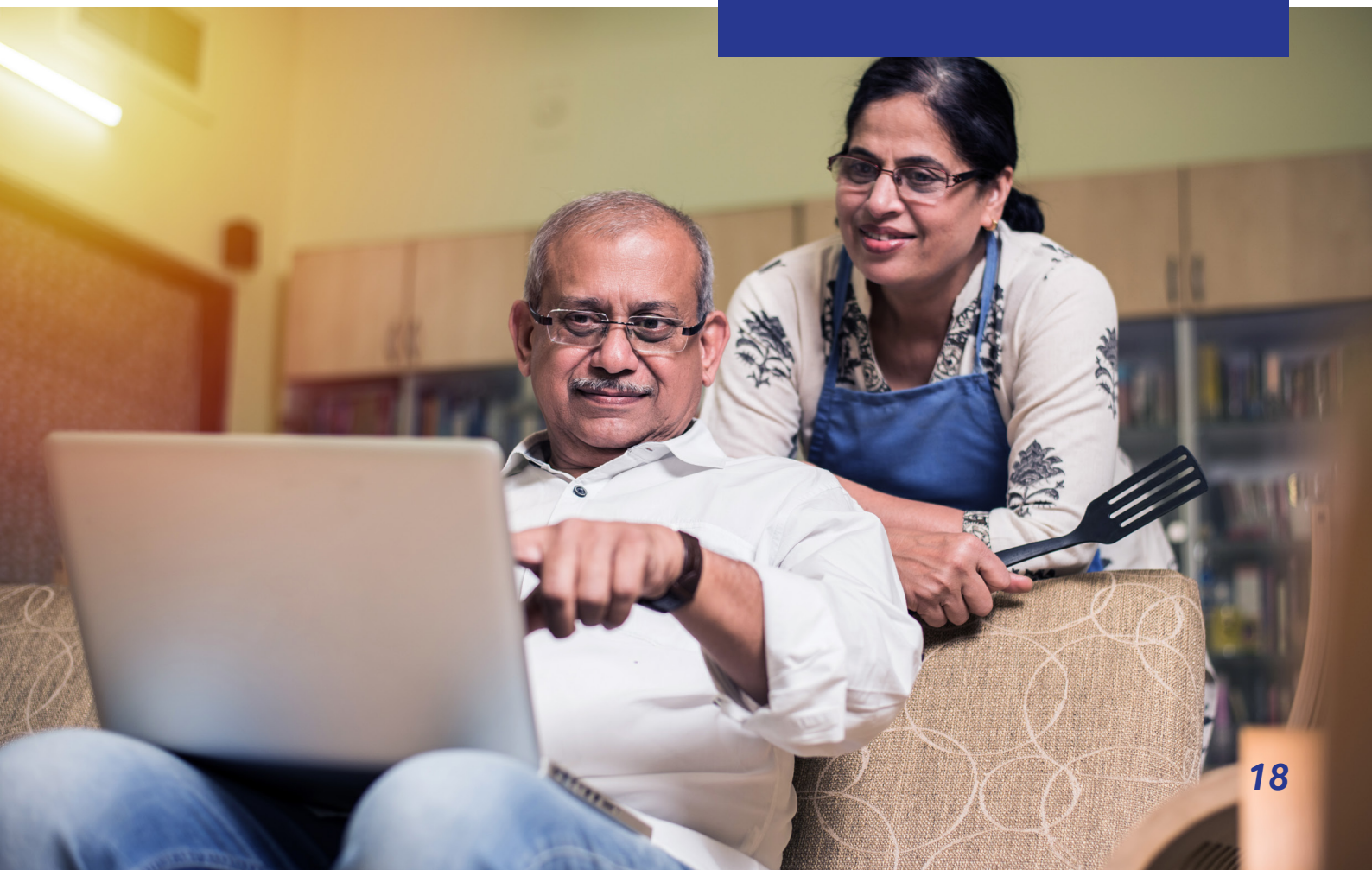
- Psychological – if the initial part of the meeting is spent on reviewing every item of the minutes, members may resent it as a waste of their time
- Procedural – it's difficult to separate reports on previous business from discussion of future actions, which can lead to entanglement in items later on the agenda
- Behavioural – human nature being what it is, a member might try to re-open discussion on an issue that's already been decided.

In preparing the agenda, you must think about how much time is available – it's unfair to the committee members to have to restrict discussions just because of the length of the agenda. It's bad practice to close the meeting with the agenda unfinished, or to let the meeting run past the agreed end time.

Here's an example of an agenda for a committee meeting:

Agenda

1. Apologies for absence
2. Minutes of previous meeting
3. Matters arising
4. Secretary's report
5. Treasurer's report
6. Pedestrian crossing on High Street – progress report
7. Housing repairs – current situation
8. Any other business
9. Date/time/venue of the next meeting



The Treasurer

The Treasurer is responsible for managing the finances of the forum and maintaining accurate financial records.

Although the Treasurer has primary responsibility for the finances, they must work closely with the other members of the committee, and it's essential that the finances are handled in accordance with the constitution and with the decisions of the committee. The Treasurer is ultimately responsible for many functions related to finance whether working alone or with the help of a paid official.

Responsibilities

- Regularly reporting to the committee on the organisation's financial position
- Arranging for the statement of accounts to be audited
- Looking after the finances of the organisation
- Collecting subscriptions and all the money due to the organisation
- Paying bills on time and recording the information
- Keeping up-to-date records for all financial transactions
- Ensuring that funds are spent properly
- Issuing receipts for all money received and recording this information
- Preparing a year end statement of accounts to present to the auditor
- Presenting an end of year financial report to the annual general meeting
- Financial planning, including producing an annual budget and monitoring it throughout the year
- Giving financial advice to the committee to ensure it operates within its means

The Treasurer is ultimately responsible even if these duties are delegated to a professional officer. It's up to the Treasurer to make sure that any delegated work is properly carried out.

Equipment

Most of the financial records can be kept electronically, but hard copies are still required for members and for accounting purposes.

An efficient Treasurer should have:

- a petty cash box
- an analysed cash book to record money received (receipts) and paid out (payments)
- box file or lever arch file for storing completed documents
- receipt book (in duplicate) to issue receipts for money received

Paying the bills

It's important to pay out-of-pocket expenses to volunteers promptly, since they've already paid out the money on behalf of the organisation and are also giving their time free of charge. Bills should be paid within one month of receiving them, especially when dealing with companies that you use often.

Normally, bills will be for items that have been budgeted for – if the Treasurer receives a bill for something that hasn't been approved and isn't routine, the committee should be informed and asked for guidance.

It's a good idea for the committee to set limits for financial decisions. For example, the Treasurer might be permitted to personally authorise smaller sums, larger sums might require consultation with another officer, and significant expenditure might require authorisation from the whole committee.

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Sample expenses policy

The forum believes that older people shouldn't be prevented from participating in the activities of an older people's forum for financial reasons. Any out-of-pocket expenses incurred as a result of being a representative of the forum should be reimbursed.

1. If the venue(s) selected necessitate(s) parking costs for those travelling by car, consideration will be given to reimbursing such costs if agreed by a majority within the forum. The forum will always consider the costs of the above when choosing venues which are convenient for public transport and with free parking nearby.
2. The forum expects members attending meetings or events as a representative of the forum to be able to claim for any out-of-pocket expenses incurred. The rates and types of expenses are detailed below.
3. A copy of the policy will be handed out to each member as they join. The treasurer will guide members on how to make a claim.
4. All costs incurred during the course of forum business must be evidenced by original receipts, and where mileage is being claimed, an accurate record kept. In order to make a claim, members will be required to fill in an expenses form, which will be kept as a record for accounting purposes.
5. It is expected that forum members will use any concessionary passes (e.g. railcards, bus passes and/or car share).
6. Any expenses received, as long as they're direct reimbursement for sums incurred, don't need to be declared for tax purposes.

General

- Expenses can be claimed by forum members only for costs approved by the forum.
- All claims must be accompanied by an itemised receipt, otherwise money won't be refunded.

All payments must relate back to an invoice or document. This also applies to claims for expenses from volunteers or members of the committee. Here's a template claim form to be filled in before the Treasurer pays out expenses.



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Name

Address

Date of claim

Expenses	Date and reason for expenditure	Cost
Travel Mileage Parking fees Bus fare Train fare Taxi fare		
Postage		
Stationary		
Miscellaneous		
Total		

Receipts must be attached wherever possible.

Signature

Date

Treasurer's signature

Date

Petty cash

You will need to use cash for small payments where it's impractical or unreasonable to use a cheque, although with the increased use of online banking, the use of petty cash is becoming less common. The petty cash needs to be handled carefully, otherwise it will become difficult to control. Use a petty cash book to record the cash paid out, the cash received and the balance in hand.

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Preparing a budget

A good Treasurer not only records details of what has happened but also of what is likely to happen. This budget or forecast is important to ensure that your organisation's future planning and decision-making.

The preparation of the budget is usually left to the Treasurer and one or two selected officers. However, it should be discussed with the committee for modification and approval.

Never set a budget with a deficit in the hope that some funds will turn up – always plan for the budget to break even and ideally build in a contingency fund.

Sometimes you'll find that your original budget was inaccurate. It's worth producing a revised budget with a more accurate prediction for the year.



Accounts

The accounts must record all income and expenditure. They can be kept electronically or in books and ledgers. They usually cover a 12-month period (the financial year).

All receipts and payments must be recorded in the spreadsheets or account books. Each record should include:

- entry date
- person/organisation being paid or from whom money was received
- cheque/reference number (for payments made) or receipt number (for monies received)
- your organisation's reference number
- details of the transaction

At the end of the 12 months, it's recommended that the accounts are audited by an independent person, preferably someone with a relevant qualification. If the organisation is a limited company or a registered charity, it should have a registered auditor who produces a report under the requirements of the Companies Act or the Charity Commission. Most organisations that aren't charities or limited companies elect independent honorary auditors to verify the accounts produced by the Treasurer.

The Treasurer should regularly prepare an up-to-date statement of accounts for the committee showing the receipts and payments, the budget for the year and the balance remaining.

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Here's an example of a statement of accounts for a local forum prepared halfway through the financial year.

Item	Annual budget	Payments to date	Present balance	Revised budget
Hall hire	200	120	80	240
Fees	250	125	125	250
Postage	100	55	45	100
Tea and coffee	25	25	0	0
Stationery	30	25	5	25
Admin	50	30	20	60
Travel	250	140	110	280
Printing	65	50	15	75
Sundries	30	10	20	30
Total (payments)	1000	580	420	1085

Working with the committee

The Treasurer needs to know what everyone on the committee is doing and should not work alone. Similarly, the rest of the committee should know the finances of the organisation. The Treasurer must be informed well in advance of any significant expenditure that is planned, even if it's within the approved budget. This helps to avoid overspending or cashflow problems which could have been prevented.

All members of the committee share a responsibility to ensure that the organisation is financially viable. They should be informed about the financial situation and reminded at every opportunity that they have a responsibility to look after the organisation's financial well-being.

Remember that you're a volunteer, not an employed accountant. If you feel under pressure or confused, seek help from your committee – you're there to support each other.

General Data Protection Regulation (GDPR)

A lot of the GDPR legislation is very similar to the previous Data Protection Act. It's in place to ensure that organisations respect and take care of people's personal data and don't keep any information that they don't need.

Personal data is information about a person which is identifiable as being about them, including names and addresses, as well as more sensitive information. It can be held on paper or electronically.

It's important to make the distinction between personal data that belongs to your forum and contact details that belong to you personally. If you met a person and received their information through your involvement with the forum, the data belongs to the forum and shouldn't be used for personal reasons without consent.

Your forum needs to have a clear purpose for collecting and storing personal data. For example, if you need to send information to all your members about upcoming meetings, you'll need their names and addresses or email addresses. However, you don't need other information about people, such as their marital status or gender.

According to the GDPR legislation, your forum should only collect, store and use personal data if you are doing so for one of the following reasons:

- To serve your forum's 'legitimate interests'
- Explicit consent from the person whose data it is
- To fulfil a contract with the person whose data it is
- To meet a legal obligation
- To perform a public task

Legitimate interests means that you can use data in ways that are necessary in order to run your forum. You should only keep and use the minimum amount of data that you need and you should give people the option of having their data removed from your records.

For example, if your forum needs to contact local over 50s about meetings that all are entitled to attend, it's in the forum's legitimate interests to send them a letter or email with information about the forum and its meetings. This should include contact details for the forum and clear information explaining that they can ask to be removed from the mailing list if they don't want to continue receiving information.

'Cold' contacting, such as general mailings, are acceptable as long as they meet legitimate interests, and the recipient is full informed as to why the contact was made and how to have their data removed from your records.

Your forum can use personal data if you have explicit recorded consent. Consent is only valid for the particular purpose it was gained. For example, if you have consent to send someone a newsletter, it doesn't mean you have consent to send any other information. Consent must be given by signing or ticking a box – it cannot be an opt-out option. Records need to show when and how consent was given, and the specific purpose.

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When your forum collects personal data, you should provide them with a privacy notice which tells them why you need or have their data. It should include:

- The name of your forum
- What the data will be used for
- Which basis you have for using the data
- How long the data will be kept
- Whether the data will be shared with a third party
- That individuals can ask to have their data removed at any time

All personal data must be kept securely. If you use electronic storage, your computer should be password protected and have up-to-date virus software. If your forum stores data on paper, it should be filed securely. All reasonable steps must be taken to protect personal data.

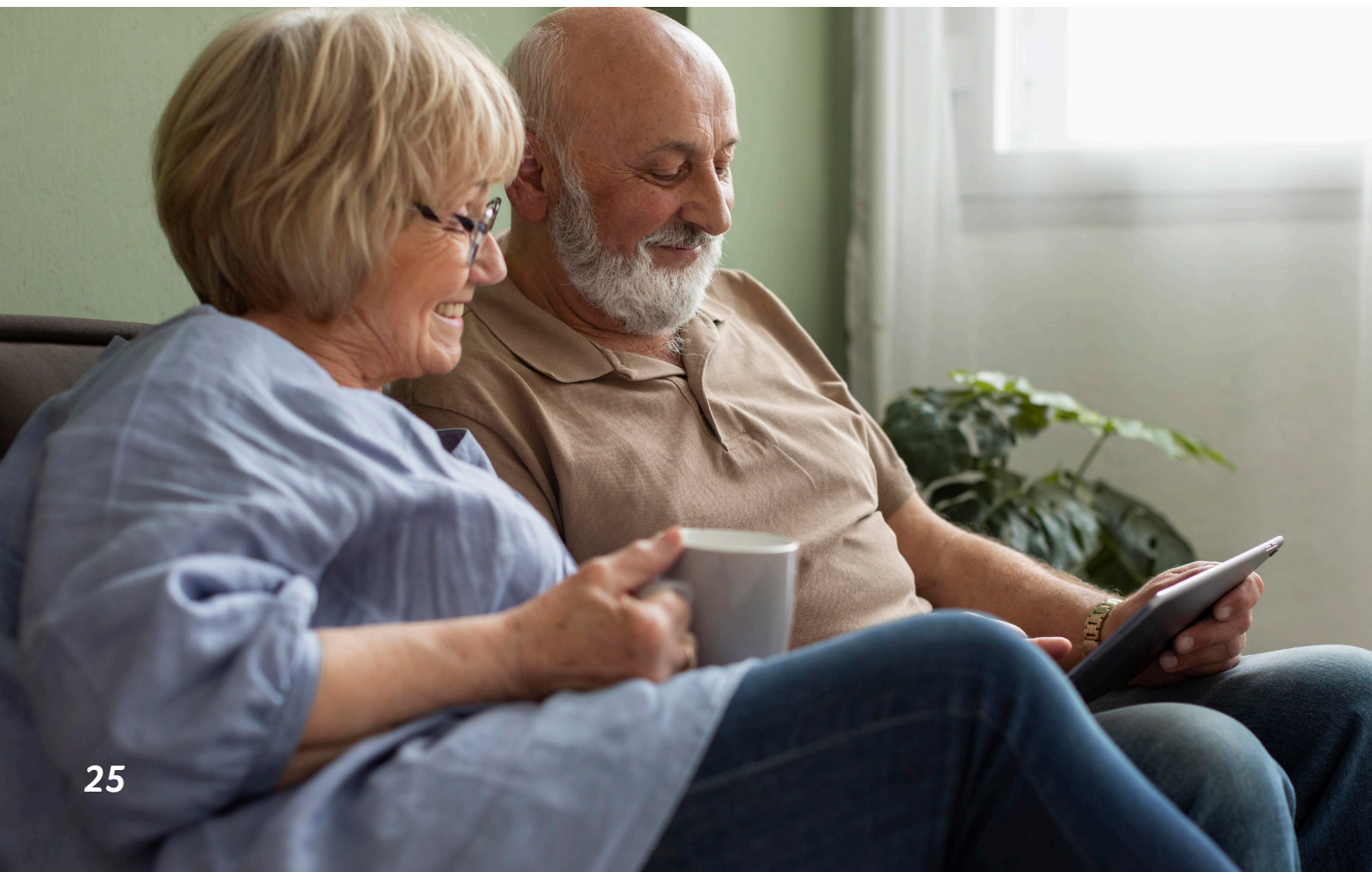
You should request explicit consent if you want to share personal data with a third party. This might be another organisation, but it could also be members of your own group. For example, if you send a group email, make sure that the email addresses are typed into the Bcc field to ensure that all email addresses are hidden.

Once you have finished using personal data for the purpose it was collected, it should be deleted.

Your forum should have a Data Protection Policy. There are many sources to help you write a policy, including Age Cymru.

The Resource Centre is a website with a lot of resources for community groups, including how to comply with the General Data Protection Regulation (GDPR) and the Data Protection Act 2018.

www.resourcecentre.org.uk



Public speaking with confidence

Many people feel nervous about giving a formal talk or presentation in public. In fact, surveys often show public speaking as one of people's worst fears. The main reasons for this appear to be:

- unfamiliar situation – most people rarely speak to an audience and the formality of the situation causes apprehension
- lack of confidence – this often stems from a feeling that others are better speakers or that they know more about the subject
- sense of isolation – the speaker is alone and the centre of attention
- self-consciousness – about accents, grammar, voice and general image
- fear of looking or sounding foolish – forgetting what to say, stumbling over words or saying the 'wrong' thing



Nerves and how to deal with them

The physical signs of anxiety are all too familiar to those affected; increased heart rate, breathing and adrenaline, over-rapid reactions, and tension in the neck and shoulders. These bodily changes can affect the voice, but they can be overcome.

Relax

Take a deep breath, hold it, then breathe out slowly. At the same time, try to relax your arms, shoulders and hands. Repeat this as often as you can before you start to speak.

Loosen up your vocal cords by humming or going through some sounds.

Try to relax the situation – tell your audience that you are nervous about speaking.

Practise

Experience of public speaking will help to overcome normal or moderate degrees of apprehension. Deliberately avoiding situations will only make you feel more anxious when you are finally confronted by them. Although it sounds easier said than done, public speaking is the best antidote to anxiety.

Another effective way of gaining confidence is to phone a local live radio show with your opinion on current events. Success at putting your views clearly over the airwaves will give your confidence a boost.

Prepare

Above all, you must prepare for the session. Much of the apprehension can be reduced by thorough preparation of the material and by organising your ideas into note form.

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Effective presentations

Some of the anxiety over public speaking can be overcome by the three Ps: planning, preparation, practice. Being prepared is half the battle in overcoming anxiety.

Planning

- Set your objectives – consider the purpose of your presentation and the message you are trying to get across to the audience.
- Know your audience – how many will you be speaking to? Why will they be there? What is their prior knowledge? What are their experiences?
- Consider the time you have and how much you can reasonably say in that time.
- Decide how you are going to structure your presentation. You need an introduction, a middle and a conclusion (or ‘tell them what you’re going to tell them, tell them, then tell them again’).
- The first four minutes are the time when you are likely to have the attention of your audience – it’s important to make an impact with your introduction.
- Make notes. Unless you’re reading a speech, your notes should consist of key words and phrases – just enough to jog your memory and remind you of points you want to make. You can use cue cards or ordinary notes on paper depending on your preference, but use clear, large print so you can read them easily.

Preparation

- Prepare any visual aids you want to use – slides, flipchart, whiteboard or Powerpoint.
- Make sure any equipment you need is available, works, is properly set up and that you’re familiar with it.
- Check your venue and familiarise yourself with it if possible. Make sure that your audience will be able to see and hear you.

Practice

- Practise your presentation out loud, either on your own or in front of friends who will give you helpful feedback.
- Record yourself so you can watch or listen to yourself. This will identify how much you vary the tone of your voice, any points you might want to emphasise and the amount of enthusiasm you communicate.
- Practise smiling. By smiling you are conveying the message to your audience. This makes people feel more comfortable, which in turn affects how you relate to your audience.

Tips:

Make eye contact with individual members of the audience as you are speaking.

People like looking at things, but if you are using visuals, keep them simple.

Consider giving handouts to your audience to take away and give them a memory prompt when recalling your speech.

Try to vary the tone and speed of your voice during your presentation. Convey energy when you need to and slow down to draw them in when appropriate.

Keep it short and simple.

Finding funding

Whatever your forum wants to do, there will be costs. Whether or not you apply for grants or raise your own funds via events, you should have a clear idea what the money is for.

Applying for grants can appear daunting. The official forms, the language used and the multiple requirements can be a deterrent, to the degree that you don't want to take it any further because it seems too difficult. But if you plan ahead and have a clear idea of what you want to do, applying for grants is not as difficult as it might seem.

Planning

Regardless of whether you are applying for grants, it is good practice to invest some time in planning the next 12 months' priorities. Once you've done it a couple of times, you'll see how easy it is – your priorities don't have to be complicated. For example:

1. Set monthly meeting dates
2. Book venues
3. Approach/write to speakers
4. Agree issues to be taken forward at first meeting
5. Agree how to take issues forward
6. Feed back to members on progress

Successful funding bids

Before you start:

- Check your constitution – has it been accepted by the members and is it signed by the chair?
- Check your costings – are they realistic, based on established costs, and do they include all elements of the proposal?
- Check your proposals – do they fit in with what the forum is aiming to do? Are they permitted activities within the definition of your constitution?
- Check the wording of your application – have you used easily understood language, avoiding acronyms? Have you answered all the questions on the application form?
- Check the required enclosures – draw up a checklist and tick them off as you gather them to send to the funder. Get another person to check that all the papers are there.

Never apply for funding just because 'the offer is there' - apply for funding for items that the forum has identified in its plans. Make sure you're asking funders to support work that the forum has identified as a main priority – you don't want to get money for a non-essential extra that you might not be able to complete when all your money is for a newsletter, for example.

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Detail, detail, detail

- What does your forum want the money for?
- Who's decided the money is needed?
- Have you done your research?
- Have others been involved in the proposals?
- Have you found out how much it will all cost?
- If you were a funder, would you want to fund the proposals?
- Are your constitution, annual report and accounts in order?

Most importantly, what will happen as a result of the forum getting the money? In other words – what will change?

Approaching funders

Your approach to any funder must refer to the vision of your forum and the aims of the particular project or proposal needing funding.

- Remember that you want their money and they're entitled to set the rules.
- Funders have long memories and you may want to approach them in the future. Remember to say thank you and keep them informed of your progress.
- Choose appropriate funders by checking criteria.
- Research, plan, speak to potential funders, draft and re-draft your submission.
- Time your application to fit with funders' meetings (these vary from funder to funder, so check them out).



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Applying for funding

Sometimes a funding application document will be provided by the grant-making body. If there's no such document, this is what needs to be included:

- Who you are (history, aims, achievements, plans)
- How the money is going to be spent and on what (needs, solutions, user benefits, monitoring)
- Information to show that the project meets the funder's criteria for support
- Are the costings accurate? (there may be hidden extras which must be included, such as advertising costs or ink cartridges for your printer)
- What you want from the funder
- Whether you're applying to any other funder (funders like to know your eggs are not all in one basket)
- What your long-term funding plans are
- Evidence that your forum is viable, credible and sustainable
- Check funders' names and addresses are correct.

Your application should ideally be typed and many funders now prefer online applications. If this is not the case and you submit a hand-written application, make sure that it is legible – funders don't have time to try to read difficult writing.

Do

- Use the guidelines
- Be clear and concise
- Keep it simple and realistic
- Present accurate costs
- Be patient
- Keep copies
- Say thank you at once

Don't:

- Use jargon
- Waffle
- Say 'Dear Sir/Madam'
- Use out-of-date information
- Apply to every organisation you can find
- Enclose everything but the kitchen sink
- Ignore questions



Grabbing media attention

The media play a critical role in campaigning. Media coverage is perhaps one of the best pegs to hang your campaign on, to warm up your target audience and ensure your forum's voice is heard. But it's easier said than done. Some organisations are frustrated by failure to get the media interested in their stories, some have had bad experiences in the past, others say they don't have time to make media coverage a priority – a big mistake.

Local campaigning raises public awareness of important issues and good press work will tell your story to a wider audience, as well as backing up campaign messages.

Favourable news coverage has a number of benefits:

- it's crucial to influence public opinion and persuade policy-makers to bring about change
- it motivates supporters and helps with fundraising
- it raises your profile, tells the public that your groups exists, what kind of group you are and what you do. People who've read or heard about your successes are more likely to give you their active support
- it gives your objectives publicity – press work is the simplest, fastest and most effective way to reach a wide audience.

Press officer

A press officer is a useful addition to every forum. They can take responsibility for communications and be the main contact for press professionals, leaving other committee members free to concentrate on organising meetings and liaising with members.

The key to being a successful press officer is to tailor your work to journalists' requirements. The press officer needs to take a look at local papers, noting the names of reporters who write articles in your field.

Duties

- Keep an up-to-date record of contacts
- Make contact with journalists
- Write press releases and send them out
- Give interviews
- Arrange interviews for forum officers
- Keep the forum's social media up-to-date and relevant

Equipment

- Computer and printer
- Phone
- Access to a photocopier

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Initial press work

Once you've researched your potential media outlets, let the press know about your forum. Send out a simple announcement for journalists' contacts files. Make sure you include:

- the group's name
- your name and address
- the names of your forum's officers
- your daytime and evening phone number (journalists work in the evenings and at weekends, so if you're available, they'll contact you and your forum's profile will rise)
- general information about your group

Campaigns

Well targeted media work can help change local policies. Pressure from regular press articles, radio interviews and social media debate in influential, especially at election time. Local councillors and MSs are more likely to come on board if they see your campaign is getting attention.

For a local campaign to work, you need to:

- decide what your goals are by agreeing objectives and messages
- identify your target audience – general public, MS, councillors, local businesses
- develop effective and imaginative stories and news events
- understand the media (paper/radio/TV/online)
- be visible and vocal

More information on campaigning is detailed in the later section of this manual, 'How to develop a campaign'.

Deadlines

Your press officer should call local newspapers to check their deadlines for inside pages (for news other than the front-page headlines). Weekly papers need material two to three days before publication. Regional dailies take inside page material up to the previous day. If you're running an event and you want journalists to come along, give about three weeks' notice. Call radio stations and ask them about deadlines for news bulletins and their 'what's on' round-ups.

What makes good news?

Good stories make news. It is impossible to define a good story because issues that become news depend on countless factors. Snow in January is not news, but snow in June makes headlines.

A news item grows from:

- people doing things
- people having things done to them
- conflict
- unusual things and actions

Typical news angles

Controversy and conflict

Emotive and controversial issues always make the news. If you're sure of your facts on a controversial topic, agree a 'line' or public position with the group. Then ring a journalist, write a news release or post on social media.

Human interest

News is about real people and local news is about local people. Bring statistics and political issues to life by including the story of a local person to illustrate the point.

Surveys and reports

Nationally, surveys and reports are good routes to publicity. You can do your own research to find local angles for national surveys. It takes some work but it's worth it (see Effective issue-raising: Surveys and research).

Anniversaries, events and special days

Forward plan for such occasions and see if you can create an story angle which will attract media interest in advance.

News hooks

Your own news value will be increased by something to 'hang' your story on – a strong hook.

It could be that you have a local angle on something that is happening nationally. If you have no hook, you can make one by:

- holding a meeting about a local issue
- launching a campaign
- giving a speech to a local group or club and invite the press
- holding an annual general meeting
- welcoming/condemning new council or government proposals
- doing a local survey, opinion poll or questionnaire and publishing the results
- inviting a local celebrity to a fundraising event
- holding a demonstration or sending a deputation to the local MS
- presenting a petition
- sending a letter to your MP or MS and copying it with a press release to the local paper
- setting up a photo opportunity

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News release guidelines

There's a standard format for news releases. It ensures that journalists receive information in a clear and readable form.

Headline

Highlight the main news points. Indicate whether the content is 'for immediate release' or 'embargoed until [day/date/time]'.

Lead/intro

Start with a bang. Aim to answer as many of the 5 Ws as possible in your first sentence (what, where, when, who and why).

Source

If you haven't already done so, answer the question 'how do I know?'. Journalists need the answer as a source gives credibility to the story.

Essentials

Unless the facts speak clearly for themselves, you may have to answer the question 'so what?'. Tell the reader the answers to any other unanswered questions like why, how or who?

Quotes

Make it brief and to the point. Give the speaker's full name and job title.

Clarity

Have you said anything that needs explaining or backing up?

Length

Try to keep the release to one side of A4.

Ending

Make it clear where your story finishes by typing 'ends'.

Contact details

Include names, phone numbers and email addresses of people who can provide further information.

Notes to the editor

These tell journalists how to get copies of the report or survey, photograph or any other information.



Template press release

Llanfair Pensioners Group – News release

Pensioner protest means bus-iness Tie a big red ribbon round the old oak tree

For immediate release Monday 1 April

Llanfair Pensioners Group will be tying red ribbons on trees from Station Hill to the village green on Saturday 6 April to protest against threats to scrap the Llanfair to Aberglan bus service.

The group has been campaigning for five months to save the bus route and the red ribbon protest comes just one week before the crucial meeting to decide the fate of the service.

Members will be tying ribbons on trees along the threatened route, leaving the Station Hill bus stop at 10 am and aiming to arrive at Llanfair Village Green by 12 noon on Saturday. Once there, they will tie a giant red protest ribbon around the large oak tree next to the Bull Pub.

Llanfair Pensioners Group chairperson Marjorie Andrews commented, “We’re sending out a strong red stop signal to the

local bus company and Llanglanach council. Pensioners rely on the bus to get to the shops and visit friends. Aberglan folk use the bus to get to the church here on Sunday. The service isn’t a luxury – it ensures that pensioners and people with young children have freedom to travel.”

Llanfair Pensioners Group will be encouraging people to sign a petition which will be presented to the Mayor of Llanglanach next week.

Marjorie Andrews continued, “Regular, affordable transport is becoming a threatened species in rural Wales. Bus routes like the Llanfair to Aberglan service are a lifeline to pensioners. We won’t stand by and watch our quality of life deteriorate.”

ENDS

Contact: 01894 123456 (home) 01894 789101 (work)

Editor’s note: Llanfair statistics available from Jack Wooley

Picture editor’s note: Llanfair Pensioners Group at the oak tree on the village green at 12 noon on Saturday 6 April

A photo call can be arranged at an alternative time if necessary



Dealing with phone calls from the media

If you're sending out a news release, make sure you've thought about who will be available to take calls and be sure you've thought through what questions you might be asked. If possible, have further information available that you can email to journalists.

There are a few things you should remember when talking to journalists:

- When a journalist calls, you're not obliged to say anything. Sometimes you might not want your name in the paper – tell the reporter you can't help at this time and if possible, suggest somewhere else they can go for a comment.
- If asked to comment, be sure that the issue is one you want to comment on. Imagine you are running a campaign on disabled access. A journalist might ask for comment on changes in government policy or access to public transport. These might be 'safe' areas for you to comment on, but you might not want to respond if they want you to comment on the council's failure to employ enough people with disabilities, as it isn't part of your campaign. You don't have to comment if you don't want to.
- Although you want to speak out, you need to make sure the potential coverage fits in with the aims of your campaign.
- Have your say and give the journalist the comment they are looking for, but use the opportunity to raise at least one of your issues. Give them a story – never let a journalist go without telling them about something newsworthy happening in your forum that they should consider covering.

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Giving broadcast interviews – television and radio

Preparation

Check a few things before you go ahead:

- Which programme are you taking part in?
- Do you know it? If not, ask what sort of audience it attracts.
- What will be the context of your interview?
- How long will it be?
- Will others be taking part?
- What other items will be in the programme?
- Will the interview be live or pre-recorded?
- Will it be face to face, over the phone, in the studio or at your office?

You should feel fully informed and confident about what is being asked of you. Ask the journalist what the first question will be so you can prepare and feel confident.

List three points you want to get across no matter what. Don't be deflected from the points you want to make – turn the question around (e.g. "That's an interesting/valid point, but they key issue for us is...").

Use plain language, not jargon – Keep It Short and Simple (KISS).

People want to hear about people. Illustrate your answer with a brief description of a real example from your forum's work.

Bring passion into it – remember, you care about what you're saying. Although it's important to sound authoritative, you don't want to sound dull.

Don't lose patience. Ultimately, it's the editor who decides what makes the news – your story might not make it even if you've spent hours arranging for it to happen. If you keep trying, it will happen.

If the interview is for TV and you are not going to a studio, think about what the interview venue looks like. Can you make sure your forum's name or logo is in the shot? Choose a suitable place away from traffic, other people and ringing phones.

Try to relax – don't fidget with your hair, wring your hands, tap your pencil or swivel in your chair. All these things can be distracting to the audience, as can busy patterns on clothes or large jewellery.

Once you are in front of the camera, remember that you are always performing. Look the interviewer in the face and if the interview is live, assume that the camera will cut to you before the interview begins. If the interview is pre-recorded and you're not happy, stop and ask to start your answer again. Remember that you're not a victim and most interviewers won't be trying to trip you up.

Dealing with bad press

Sometimes media outlets can get things wrong. The journalist or reporter wasn't out to get you – they were probably under pressure to get the story in quickly. If a story is inaccurate or misleading, you have a number of options depending on how serious the situation is.

- Phone the reporter or news editor, calmly listing all the mistakes or omissions
- Write a letter to the editor. Put forward your side and ask to exercise your right of reply. If you're still not happy, ask if the outlet has an ombudsman and explain your case to them
- In very serious cases you can complain to the Press Complaints Commission

Dealing with conflict

Due to the structure and work of forums, it is perhaps inevitable that in the course of debate and discussion, conflict may arise. What is not always clear is how to deal with it.

The conflict could be internal (within the forum and its members) or external (with service providers and other agencies).

Internal conflict

It's to be expected that during healthy debate a certain amount of disagreement will occur. What should be remembered is that forums are democratic organisations and when contentious issues arise, the majority rule and that opposing views should take defeat in good grace. Reasons for internal conflict can be:

- personalities
- the management of the forum
- issues under debate



Personalities

People are people and not everyone will get along. However, as long as this type of conflict doesn't interfere with the running and functioning of the forum, it's not the business of the committee.

If it does interfere with the running, there are several actions the committee can take.

1. Quiet word – nominate a member of the committee to have a quiet word with the individual(s), explaining that aggressive/insulting behaviour is unacceptable in the forum, how such behaviour affects the forum, and what the outcomes or consequences of the behaviour will be (an official warning, potentially leading to expulsion from the forum)
2. Informal meeting – if the quiet word doesn't work, try an informal meeting with the individual(s) concerned and the committee in order that the issue can be aired and the committee can clarify the situation and consequences
3. Formal meeting – if the informal approach doesn't work, invite the parties to a formal meeting which will be minuted and issue a verbal warning to cease the behaviour and outline the consequences
4. Official warning – if all the above fails to work, issue a written formal warning including what the problem is, consequences of the behaviour, expectations on resolution and timescale, and appeal opportunities
5. Action letter – if the behaviour doesn't stop, write a letter informing the parties of your actions and the timescale

Remember that most people don't enjoy being in a situation involving conflict. Try subtle approaches to begin with and always discuss with the committee methods of approach. It's useful to have a complaints policy.

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Sample complaints procedure

The forum believes that, as part of its commitment to the aims and objectives set out in the constitution, it is the responsibility of the committee and members to put in place a complaints procedure. This means that where people are dissatisfied with the nature of the forum's work, they have the right of complaint and the means to do so.

It is hoped that if the complaint is minor in nature, it might be resolved informally by the committee to the satisfaction of the complainant. Where the complainant is unsatisfied, the procedure below is followed.

Notification

Where possible, complaints should be made in writing for the attention of the chair. If this is not possible, an oral complaint will be adequate. Receipt of the complaint will be

acknowledged within 14 days and all persons will be notified by the chair.

If the complaint is about the chair, it should be forwarded to the vice-chair.

Investigation

All formal complaints will be investigated by a person or persons independent of the complaint. In some circumstances, this investigation will be carried out by an external independent person or persons. A decision will then be made on the justification for the complaint and the action to be taken. The decision will be served in writing to all persons concerned within 28 days. There will be a right for those involved in any investigation to have a friend/colleague/advocate present at any, or all, stages

Management of the forum

Conflict can arise when members disagree on the way the forum is being run or managed. This can either be members criticising the committee or conflict within the committee itself.

Members vs committee

If a member has conflict with the committee regarding the running of the forum:

1. Refer to the constitution and explain the process
2. Ask the complainant to put their concerns in writing for the committee to consider and respond to
3. Respond in writing and keep a copy on file
4. Put the issue on the agenda to be discussed at an open meeting, followed by a fair and frank discussion and a consensus decision from the members. The discussion and decision should be minuted and appropriate action taken
5. If the complainant continues to raise issues that have to be dealt with, the chair should explain that they have been dealt with and will not be discussed in open meeting again. Give the person the opportunity to put the grievance in writing
6. Consider bringing in an independent person to act as arbitrator with both parties agreeing to abide by the recommendations of the arbitrator
7. If all possible steps have been taken to resolve the conflict, the committee may have to consider the expulsion of the complainant

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Committee vs committee

From time to time all committees have disagreements, but as long as they can be resolved and the forum can move on, this is healthy.

When conflict is ongoing, it's most likely to be caused by an unfair distribution of work or committee members not fulfilling their specific role.

1. Ensure that the distribution of work/tasks is fair and that one member isn't always being left with all the work
2. Ensure that those tasked with work know what they are tasked with and the timescale in which it should be completed
3. Ensure that all committee members know what their role is and what's expected of them
4. If the conflict continues, follow the steps laid out for members vs committee

Issues under debate

Causes of conflict arising from issues under debate are usually the easiest to resolve.

If the forum is discussing an issue on which there are clearly opposing views, ensure that as much information for both sides is fully disclosed at an open meeting and ask the members to vote.

It will almost certainly be impossible to form an effective campaign on an issue around which there is unresolved conflict within the forum.

Forum behaviour

The forum should consider writing policies to ensure that members and committee know what behaviour is expected and behaviour that won't be tolerated, e.g. abusive language, intimidation or threatening behaviour, etc.

External conflict

The forum may come into conflict with service providers or other agencies. If this happens:

1. Don't take things personally (if it does become personal, consider making a complaint)
2. Be professional
3. Put questions in writing, asking for a response with a time limit
4. If the conflict persists and is destructive, discuss approach methods with the committee
5. Put your concerns in writing asking for resolution
6. If this is ignored, approach the person's manager and ask for a meeting
7. Alternatively, consider asking an arbitrator to the meeting – make a note of the meeting and the resolution

Remember, for all areas of conflict, there has to be an instigator, a responder and, it is hoped, a resolution. In all cases, you must minimise the effect on the forum, ensure that the aggrieved is given the opportunity to air their views fully and that a resolution is found quickly.



Section 3

Effective issue raising

How to develop a campaign

According to the Collins English Dictionary, a campaign is ‘a planned set of activities that people carry out over a period of time in order to achieve something such as social or political change’.

Sometimes campaigning can seem like a huge undertaking, but with a little planning and organisation, your forum can make a difference.

Why do forums campaign?

Many older people’s forums are set up to ensure the voices and views of older people are heard on the issues that matter to them the most. They aim to have a positive influence on the provision of local services and policy making, inasmuch as these affect older people.

Most forums start a campaign because their members feel passionately about something they want to create or change. Forums tend to identify the issues about which their members are most concerned and work to improve local services across the statutory, voluntary and private sectors.

Many forums are established in recognition that collective action and campaigning are required to bring about change. Initially, this may be in relation to one issue. For example, the closure of the local post office, the re-routing of a local bus service, the lack of public toilet provision, the unavailability of an NHS dental service, etc.

It’s important to remember that campaigning is not about complaining. It’s about taking constructive action to change the world (or at least a part of it!).

The types of issues forums may campaign on

At any one time forums may be campaigning on a range of issues including:

- improvements to local transport arrangements;
- access to local leisure and education facilities;
- post office closures;
- out-of-hours cover for health care services.

Whatever the particular issue of concern, similar principles will apply. This section is designed to outline the steps your forum should take when planning a campaign.

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The benefits of campaigning

Campaigning can bring a number of benefits to your forum. For example, effective campaigning can:

- raise awareness about your forum and the issues important to its members;
- prevent bad and promote good public policy decisions;
- influence and sometimes set the public policy agenda;
- influence public opinion and behaviour;
- influence national legislation, regulation and guidance and its implementation at regional and local level;

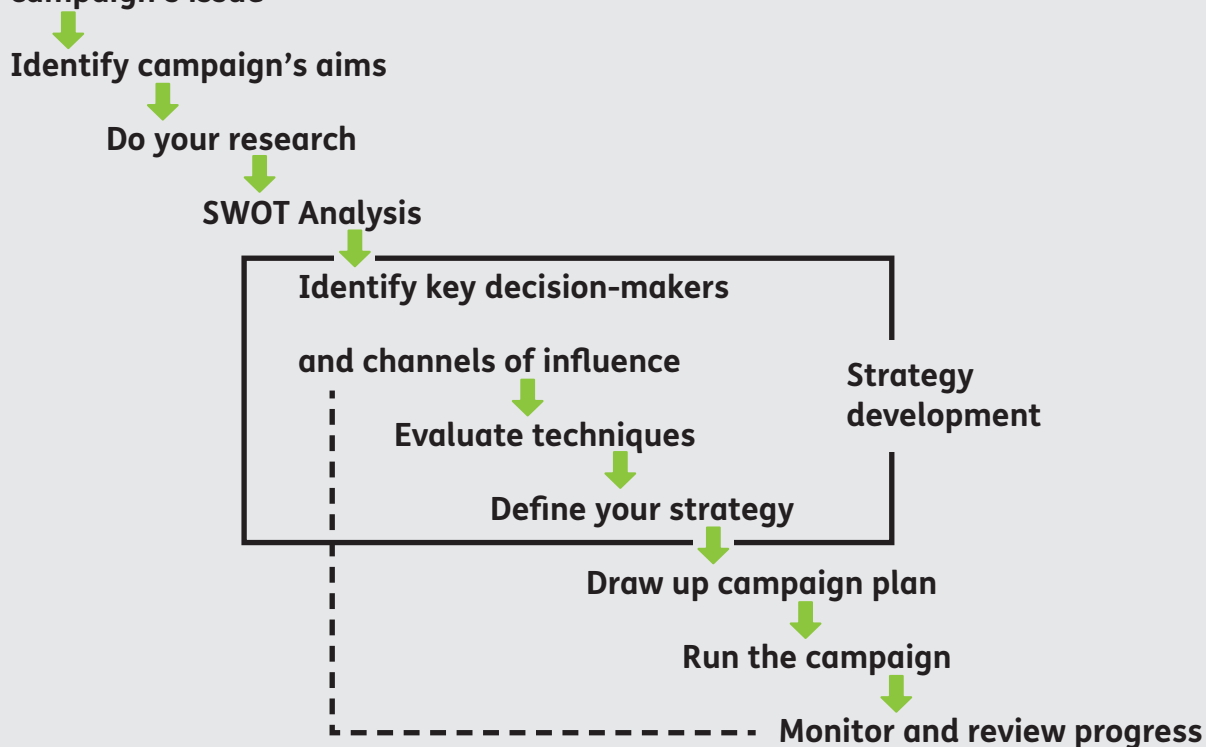
- attract new members;
- attract new sources of funding;
- strengthen the forum's reputation.

In short, a good campaign can both exemplify and deliver the things for which your forum stands. This isn't to say that campaigns should be developed for their own sake – they still need clear objectives and should reflect your forum's priorities. However, what it does mean is that your forum should constantly be seeking opportunities to stage appropriate campaigns in order to capture the benefits identified above.

Steps in planning a campaign

All over Wales, local groups are making sure their voices are heard on the issues that matter to them. Whether you want to save your local post office, get a new zebra crossing outside the local community centre or change the way older people are portrayed in the media, there are some important steps to take that will help your forum to carry out an effective campaign.

Agree campaign's issue



Step 1: Identify opportunities and choose the right campaign

Sometimes an issue will clearly fall within the remit of the forum and meet its overall raison d'être and you won't have to ask whether the forum should become involved. On other occasions, it may not be as clear-cut and other priorities may mean that the forum is forced to make difficult choices about which campaigns to pursue. A lot of time and effort can be wasted in pursuing a campaign which may be doomed to failure. It's therefore vital that your forum chooses which campaigns

to follow – this is even more important in the context of limited resources.

The table below suggests some of the questions that your forum should ask when assessing whether or not a campaign is the right one to follow before devoting valuable resources to it.

Priority	<ul style="list-style-type: none"> • Does the campaign fit with the aims of your forum? • How important is the issue to your forum? • Do the majority of members share the concerns? • Does the matter disproportionately affect older people? • Can you afford not to get involved?
Positioning	<ul style="list-style-type: none"> • Does your forum have credibility with relevant audiences (e.g. the public, press, professionals)? • Will your forum's intervention be taken seriously?
Targets	<ul style="list-style-type: none"> • Who is the target for the campaign? • Has the forum identified where decisions are made? • What are the influences on these decision-makers? • Can the forum make a difference at this level? • Would the forum be better tackling the issue at another level?
Alternatives	<ul style="list-style-type: none"> • Would the time and effort of the forum produce better results if spent on a different campaign? • Are there other organisations better equipped to take up this campaign?
Arguments	<ul style="list-style-type: none"> • How good is the argument the forum is putting up? • Is there evidence to back up what you are saying? • Will expert opinion be available/supportive? • Can the forum produce supporting evidence quickly and convincingly?

Section 3: Effective issue raising

Public/media opinion	<ul style="list-style-type: none"> • Does the campaign need public support and a media profile? • Is there public support (or can the forum mobilise it)? • Can the forum get media coverage?
Capacity	<ul style="list-style-type: none"> • What skills and resources are available to the forum? • How many people can the forum expect to offer help? • Are there enough to support this campaign? • Can you supplement them before starting? • Will the campaign provide opportunities to attract new members to the forum?
Allies	<ul style="list-style-type: none"> • What are the pros and cons of working in alliance with other forums/ groups? • Do other groups have more leverage on decision-makers and can you rely on them to run an effective campaign?
Acid tests	<ul style="list-style-type: none"> • Is the issue too big/small for your forum? • Will decisions be taken at a higher level than you can influence? • Are there decisions/events/announcements in the pipeline which could affect the timing/success of the campaign? • What is the worst thing that could happen if your forum decides not to campaign on this issue? • Will anyone else do anything if your forum doesn't?

Adapted from The CPRE Campaigners' Guide, 2002

If your forum is able to answer these questions satisfactorily, then there is probably a basis for a worthwhile campaign. If not, then alternatives should be considered.

At the very least any potential campaign should be assessed on the following three levels:

- priority – is the issue of sufficient importance to the forum, is the trade-off with other priorities worth it and is now

the right time to pursue it? If we don't do something will anyone else? What's the worst thing that could happen if we decide not to campaign on this issue?

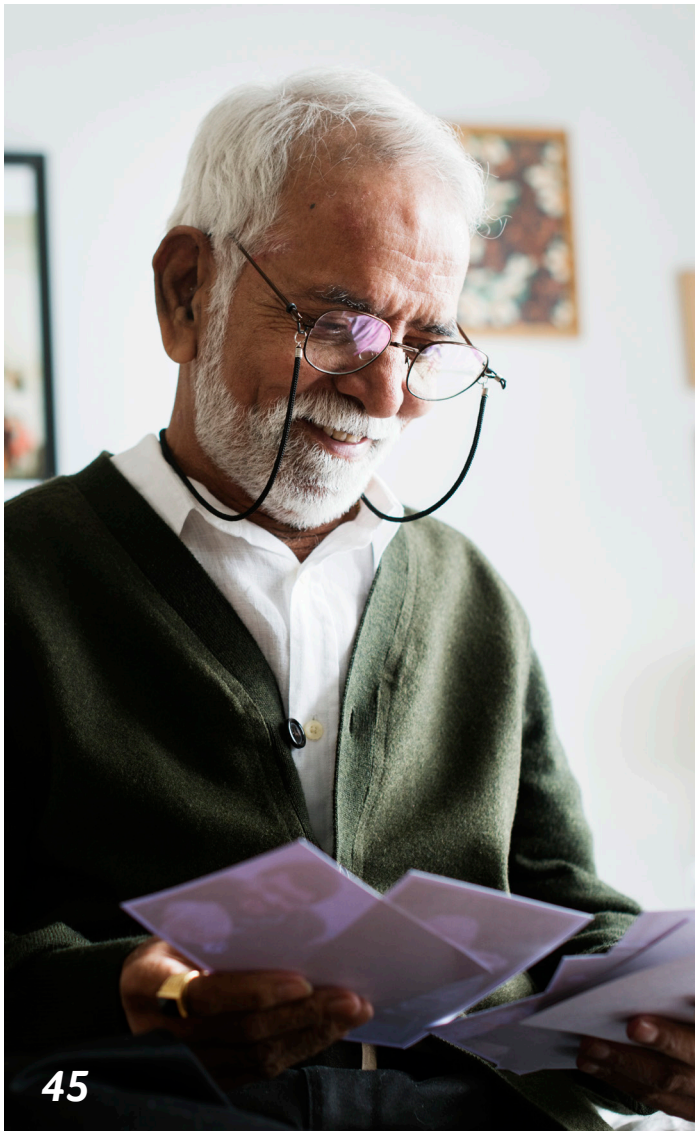
- resources – does the forum have the required resources to run an effective campaign and, if not, can they be acquired?
- practicalities – does the forum have the credibility with and the ability to reach the people who will take the decisions?

Section 3: Effective issue raising

Step 2: Identify your aims

Having decided and agreed on an issue to campaign on, your forum will need to define clearly the aims and objectives. As a group, ask yourselves what you hope to achieve and why. Those involved need to have a good understanding of the issue(s) so they are clear about what they're campaigning about. What is it that your forum really wants to see changed? If your forum has a definite goal then success is more likely to be achieved.

Rather than simply getting angry and protesting, offer some solutions and a way forward. The real trick is balancing your aim (what you really want) with what you can achieve (what you are likely to get).



Step 3: Do your research

Before starting any campaign, some background research needs to be completed to determine the facts about the issue of concern and to identify what, if any, action is currently being taken by other groups or organisations in respect of these concerns. If you know your facts, your forum is more likely to be taken seriously. Equipped with this information the forum will then be able to determine whether it is both appropriate and relevant to become involved.

Consider the following questions:

- does the issue of concern fit with the aims of the forum?
- does the matter disproportionately affect older people?
- do the majority of forum members share the concerns?

If you answer No to any of these questions, then perhaps at this stage it'd be worth lending support to another organisation more suitably qualified to take on this type of campaign.

Health warning – running a campaign requires significant physical and emotional resources. Ensure you have the support of others to guarantee the campaign can be kept running over the required period of time.

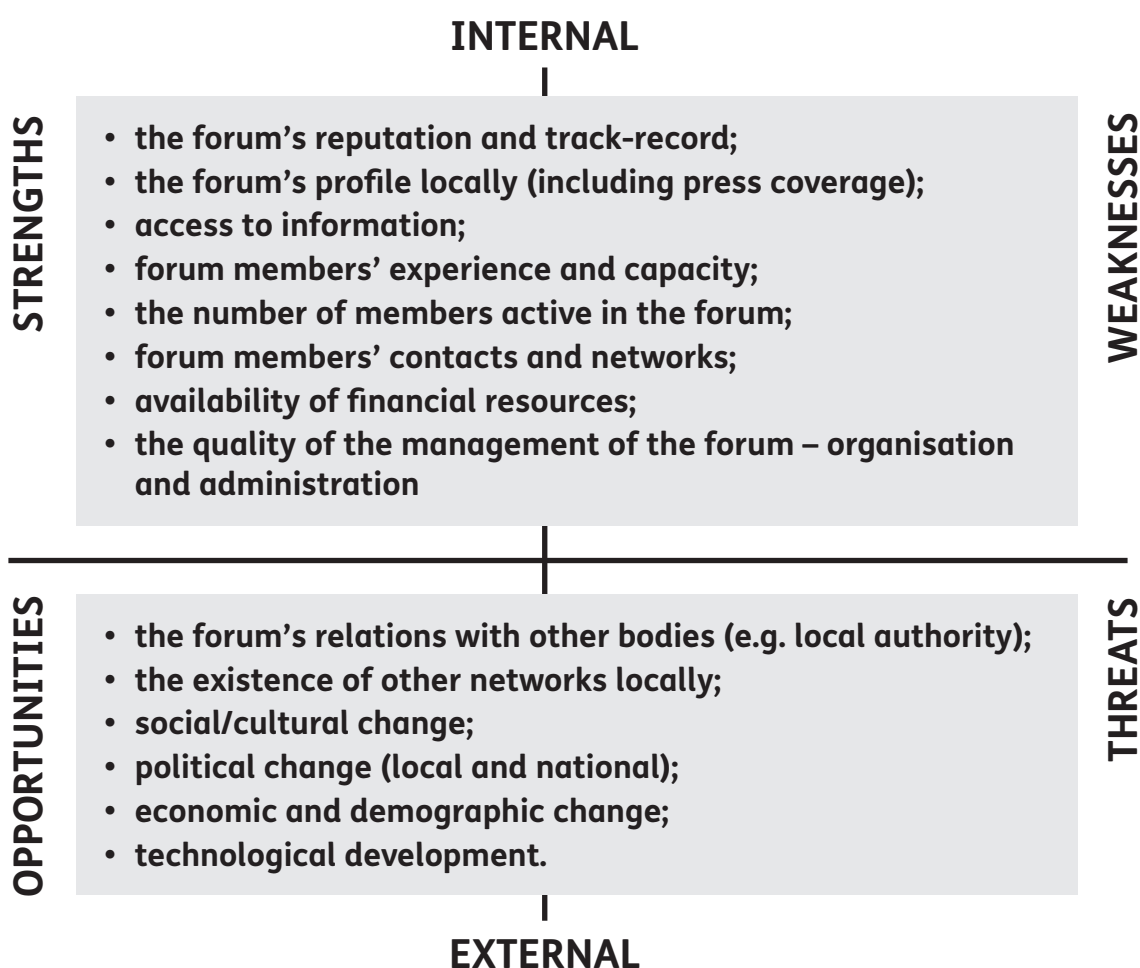
Section 3: Effective issue raising

Step 4: Do a SWOT analysis

SWOT stands for Strengths and Weaknesses, Opportunities and Threats. It's a well-known planning tool used by organisations to assess their current position in relation to the environment they operate in. SWOT analysis looks at the situation inside an organisation and at the wider factors in the external

environment. Its use could allow your forum to establish how well placed it is to develop and run a campaign.

By building on strengths and opportunities and recognising any weaknesses and potential threats, your forum will find itself better placed to plan an effective campaign.



Step 5: Identify key decision-makers

When developing a new campaign there is always a danger of launching straight into activities. Caution should be exercised and the target for the campaign should first be clearly identified. The appropriateness of different campaigning techniques will depend on i) the issue; ii) on the identified decision-makers or power holder; and iii) on the acknowledged channels of influence.

- The decision-maker or power-holder can be defined as the person or institution that can bring about the desired changes;
- The channel can be defined as the person or institution that can influence the decision maker.

(Extracted from The Campaign Handbook, Lattimer, 2000)

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Step 6: Review the techniques available

There are a number of different ways to get your message across. Depending on the issue(s) of concern some may be more appropriate than others. Here are some of the more established methods.

a) Letter Writing

Letter writing can be an effective campaign tactic when you are trying to:

- get those in positions of authority to acknowledge or understand the strength of feeling on an issue
- draw the attention of a wider public audience to an issue of concern and to ask for help to further your cause
- correct misleading statements made by others in the public domain
- support or oppose the decisions, policies or views of decision-makers
- highlight a campaign success and express gratitude to those involved

Letters may be aimed at decision-makers, opinion formers, the local media, your forum's members or other supporters.

At the beginning of any campaign, writing letters can be crucial in raising awareness about the issue(s) of concern. For example, letters could be sent to known decision-makers, local papers, and other groups with similar objectives.

It is important to draft the letter to a named decision-maker in a way that will give maximum impact; to be clear about what you want done; to use clear and direct questions and to keep your letter short and to the point.

You should also suggest positive alternatives if possible; highlight the fact that others support your campaign and keep copies of any letters sent and follow-up if you don't get a response right away.

b) Publications

There are a number of different types of publications which can be produced to support your forum's campaigns. Examples may include:

- leaflets – to inform large numbers of individuals/ organisations about the campaign, encouraging them to get involved or donate funds
- campaign newsletters – to provide a regular update on the progress of the campaign and to promote forthcoming activities/ events
- research reports – to support your arguments or influence decisions
- posters – to advertise forthcoming events or simply to make your point
- web pages and social media – to reach a wider audience
- petitions – to underline the strength of the issue



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Leaflets

Using leaflets can be an effective way of raising the profile of your campaign.

They should generally be no longer than two sides of A4, often folded with graphics or photographs included. Glossy leaflets will obviously increase printing costs, however, the investment can be worthwhile if the leaflet is well designed and targeted appropriately highlighting the issue of concern.

A leaflet allows information to be presented in a simple and accessible way and such publicity may result in the difference between having a large audience and a small one. In the past, older people's forums have used leaflets to raise awareness on stands in the town centre, for example, and such a method can link effectively with calls for people to sign up to a petition.

These days, leaflets can be produced easily on a computer, laptop or tablet.

Tips for effective leaflets

- keep it simple;
- use large headlines, small amounts of text and lots of pictures;
- make sure the print is easy to read;
- if the leaflet is bilingual, allow extra time for translation and design it to look the same in both languages;
- consider making the leaflet available in alternative formats (e.g. large print, audiotape, etc);
- ensure contact details for further info are included on the leaflet;
- don't use jargon, use plain English/Welsh.

In short, leaflets should summarise:

- the nature of the issue or the reason why the campaign has been launched;
- how people can help;
- how people can get in touch with the forum.

Campaign newsletters

A campaign newsletter in addition to, or as an insert in your forum's regular newsletter, can be a good idea for long-running campaigns.

They can serve the following purposes:

- summarise the campaign's progress and in particular celebrate successes and highlight recognised threats;
- promote forthcoming events, meetings and other activities associated with the campaign;
- suggest actions that readers can take to support the campaign;
- include details of how to get in touch and find out more about the campaign.

Research reports

The credibility of any campaign will be enhanced if there are recognised research reports available to support the arguments being put forward. Your forum should identify existing research conducted on the subject and refer to this in your publicity materials.

An important note of caution; always verify the authenticity and/or validity of any research reports. If necessary, seek expert advice. Alternatively, your forum can conduct its own research project. Such research could provide a number of opportunities, including assisting your forum to secure direct contact with the decision-makers to discuss the findings.

The publication of any research can present an opportunity to raise the profile of the issue (and that of your forum) in the media by promoting the key messages reinforced by the research.

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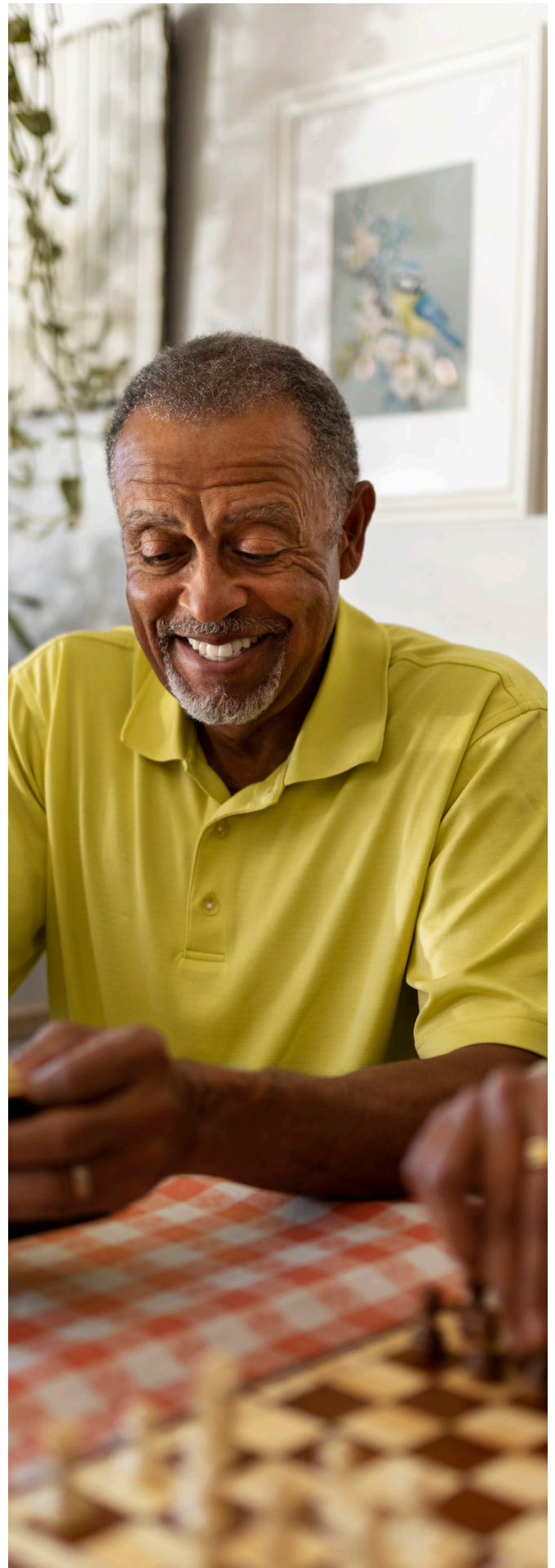
Posters

Posters should contain few words and preferably contain graphics or photographs. Bear in mind the needs of those visually impaired. RNIB Cymru recommends black ink on yellow paper to provide a good contrast. Ensure the font size is large enough to be eye-catching from a distance. The same rules as for leaflets apply.

Websites and social media

Similar principles apply as for other publications – keep it brief, simple, make it easy for people to know how to contact your forum and say what they can do to help. If your forum already has a website, then include details of all your forum’s campaigns in it rather than creating new websites for each.

Note that readers expect the information online to be kept up-to-date, so ensure someone has the task of doing this updating at regular intervals and include details of when this has been done somewhere on the site. Similarly, any e-mail queries generated from the website or social media need to be responded to promptly so, again, ensure someone is assigned to this task.



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Petitions

‘A formal written request, especially one signed by many people, appealing to authority in some cause.’ (The Oxford English Dictionary)

Petitions can be an effective way of rallying support and drawing attention to an issue. They can also be a useful means of identifying supporters beyond your forum. You can formally petition your local authority, the Senedd or UK Parliament, depending on the focus of your campaign.

The language on the petition needs to be clear and appropriate to where it is being presented. For example, if your local MS or MP is presenting the petition for your forum, then it may need to be worded in a particular way.

Seek guidance for how to do this by referring to relevant bodies, details of which are usually included on their official websites.

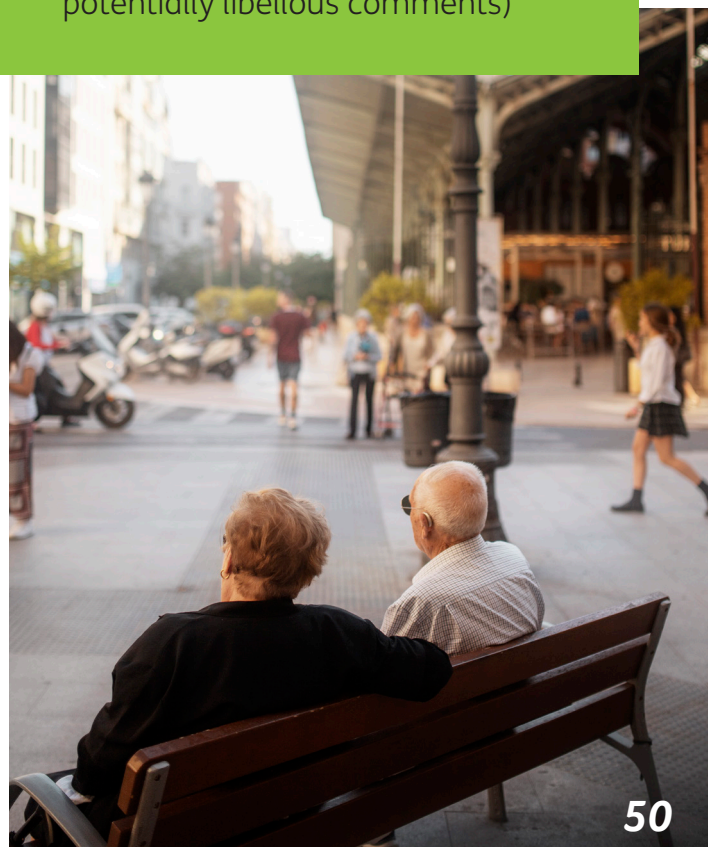
When using petitions:

- base the petition on a single, simple proposal;
- address the petition to the person taking the decision;
- allow space for people to write their contact details if you want to follow up progress of the campaign with them. Please note that the General Data Protection Regulation (GDPR) must be complied with if your forum intends to maintain such records;
- include a box for signatories to tick if they would like more details of the campaign;
- publicise the handing over of the petition – this is often a good photo opportunity.

By following some basic guidelines your forum can ensure the effectiveness of its campaign publications.

Tips for Campaign Publications

- establish purpose/objective;
- establish target audiences;
- agree the numbers needed;
- agree when needed by;
- break up text with graphics where possible;
- ensure that time and cost is built in for bilingual publications;
- identify design and printing options bearing in mind funds available for this purpose;
- consult widely among the forum about the content;
- proof-read final draft with care before printing off copies;
- ensure that contact details for the forum are included;
- do a health check (e.g. for any potentially libellous comments)



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c) Public meetings

A public meeting can be an effective tactic to launch or promote a campaign, generate media coverage or raise public awareness and secure involvement. Planning for any such event is key. Your forum may consider establishing a sub-group of members charged with overseeing the arrangements. Note that some venues require the meeting organisers to make their own insurance arrangements. This should be investigated when planning a public meeting.

Here are some general guidelines for the format of a public meeting:

- circulate an attendance list asking individuals to print clearly their name and contact details;
- open the meeting with a welcome and a brief introduction to the forum, outline the programme of the meeting, the intended finish time and remind attendees to sign the attendance sheet;
- clearly state the purpose of the meeting, succinctly and to the point;
- introduce any speakers;
- move onto the issue to be discussed;
- open up to questions/discussion (the opportunity to ask questions is vital so that attendees feel they have participated in the meeting rather than just being talked at by the speakers);
- thank the contributors;
- explain the next steps and what follow-up there is planned, giving dates of any future events;
- if possible, have refreshment breaks during the meeting. This will allow the opportunity for informal networking and for participants to sign up their support.

Following the meeting:

- do a follow-up press release immediately;
- process any membership forms received;
- keep attendees informed of the campaign;
- write and thank speakers;
- write and welcome any new members;
- prepare a plan of action for further meetings and make sure they are actioned.

Some pitfalls to be aware of:

- others may try and hi-jack the meeting with their own agenda. It is essential to have a strong Chairperson to ensure everyone keeps to the agenda;
- some attendees may misunderstand the purpose of the meeting and may believe that as organisers your forum is responsible for the problem. Avoid this by ensuring that the purpose is clarified at the start and the role of the forum clearly defined. For example, if representatives from official bodies (e.g. the local authority) have declined to attend, don't allow yourself to defend them in their absence. Make your forum's stance clear;
- gauging potential attendance at open meetings can be difficult, so make sure a venue is chosen that can offer flexibility (e.g. where partitions can be put up or removed depending on demand).

d) Publicity stunts

Publicity events are designed to get media attention (but not to break the law!). The more original the event, the more likely your forum is to attract attention. Such an event can be an excellent way to raise public awareness of the issue under concern. The success of any such event very much depends on the media publicity attracted; so ensure that the media are briefed effectively and timely.

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e) Holding a demonstration, rally or march

These can be an excellent way to get publicity, particularly if a large number of people are involved. Ensure that campaign publications are available to distribute to supporters, explaining the purpose and background to the campaign.

The media's response to any planned demonstration will be influential in its success.

Therefore, ensure that the local media are fully briefed beforehand. It can also be useful to contact the media after the event, to reinforce your message.

Unlike indoor public meetings, it should be noted that large open-air demonstrations, rallies and marches need to comply with certain legal requirements. In planning such an event your forum should ensure that:

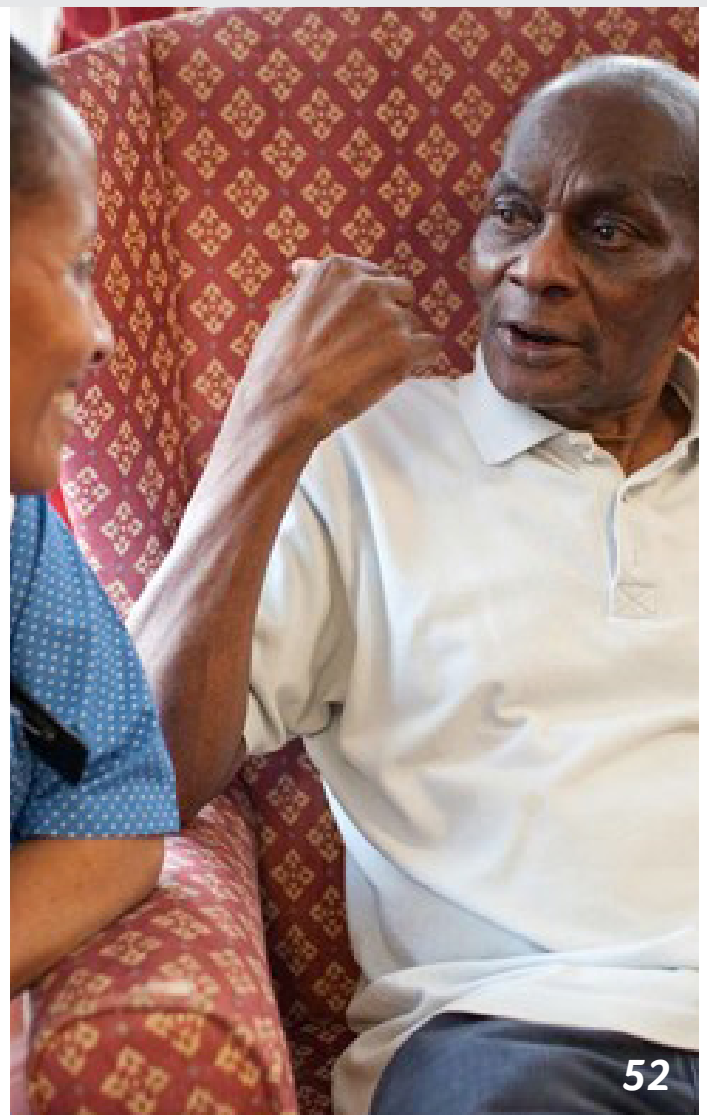
- the police have been informed of the intended route of any march and that it is acceptable to them;
- the route is mapped out for participants (e.g. via a flyer giving details of arrangements);
- it ends in a safe place for a public gathering;
- stewards are available to direct people on the route and to monitor the event.
- emergency services and/or voluntary groups such as St John's Ambulance are aware of the event to ensure the safety of participants.

f) Direct action

This is a method of campaigning where the people involved take action, which has a direct impact on the situation. For example, staging a sit-in to prevent the closure of a local day centre or other facility.

Direct action may result in the law being broken, therefore, legal advice should be taken during the early planning stages. It should be noted that such methods may risk alienating some supporters who are not prepared to use these tactics.

Your forum should think carefully before adopting this approach to make sure that everyone agrees with the action to be taken and that everyone is aware of the risks involved.



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Step 7: Define your strategy

This can be a statement of intent which outlines your target audience, defines your objectives and clearly identifies the campaign's issues.

Step 8: Draw up your campaign plan

Once all other stages have been completed your forum is in a position to draw up its campaign plan. This is basically a guide to show where your forum wants to go and how it plans to get there. There's no set blueprint for a campaign plan, but ideally it should include some key elements:

- clear and agreed overall aims of the campaign
- agreed specific objectives to achieve the overall aim
- the key targets of the campaign
- the research needed to support the campaign in its various aims
- an analysis of the opportunities and threats facing your forum as a result of staging the campaign
- agreement on the tactics to be adopted and of any events that need to be held
- agreement on the best time to stage the campaign, having identified other events already in the calendar that your forum should be aware of
- agreement on what media coverage is desirable and at what stages during the campaign
- agreement on the likely costs of running the campaign and the fundraising efforts that may be required to meet these costs;

- identifying all other resources (skills, expertise, etc.) required and the opportunities to recruit new members to your forum
- setting priorities within the plan to ensure that the most important things happen at the appropriate time
- agreed roles and responsibilities (e.g. who is going to do what, by when?)
- ensuring that the campaign complies with any external requirements
- an agreed method to monitor and evaluate the progress of the campaign. This is important in order to revise any course of action where needed, but also to celebrate success!

Step 9: Run the campaign

This is the stage where your plan is actually put into practice.

Step 10: Monitor and review

In any campaign it's important that your forum establishes milestones to identify whether the campaign has been a success or not. It's also important to review progress at regular intervals and to know when to stop. It's important that any lessons learned are captured and recalled when planning future campaigns.

7. Campaigning and the law

Age Cymru would advocate that any campaigns undertaken by forums should stay on the right side of the law. Naturally, there are many aspects of the law that campaigning forums should bear in mind. This section focuses specifically on the Charity Commission's guidelines on political activity.

Whilst Age Cymru acknowledges that not all older people's campaigning forums are registered with the Charity Commission, the guidelines it offers are still relevant. The Charity Commission requires registered charities to campaign according to the following criteria: i) accuracy; ii) balance; and iii) thorough research.

Far from disadvantaging your forum, these requirements can indeed strengthen its position since they ensure that your arguments stand up to scrutiny and will prevent allegations of political bias. Clearly, many of the issues upon which your forum may want to campaign are of a political nature in that your forum wants to influence decisions and bring about changes to current practices. However, it's well reported that one of the features of independent older people's forums is that they are non-party political.

Charities can engage in political activity if the activity is consistent with the Charity Commission's guidelines which can be found on their website www.charity-commission.gov.uk

The views expressed by a charity must be based on a well-founded and reasoned case. It must be done responsibly and with the purpose to further the aims of the charity as stated in its constitution.

Where campaigning is concerned:

- a charity shouldn't seek to organise public opinion to support or oppose a political party which advocates a particular policy favoured or applied by the charity. Where a policy promoted by a charity coincides with that of a political party, then care should be taken to ensure the independence of the charity's position;
- information publicised to support the campaign must be accurate and sufficiently full to support the charity's position;
- it's permissible for a campaign to include content of an emotional nature, but unacceptable to seek to influence decision makers or the public on the basis of purely emotive materials



Surveys and research

If you are to convince policy-makers or the general public about your campaign, you have to provide evidence, opinion and other information to back up your case. It's worth putting together a briefing containing the key information about your campaign, the evidence and quotes from older people and supporters. This will also help you to be clear on what the issue is and why it's an issue.

Research

Know your facts and find the information you need to back your argument. Age Cymru and other organisations can help you with statistics but you can also find a good deal of information on the internet, in libraries and in publications. Don't forget to use the Freedom of Information Act.

This may be the fastest and cheapest way of finding the information you need, but sometimes there is too much information and it may be difficult to identify what is most relevant to your campaign. Possible websites for beginning your search are:

www.bbc.co.uk

www.directgov.uk

www.statistics.gov.uk

www.wcva.org.uk

www.agecymru.org.uk

Be aware that some websites charge for supplying information, especially if it's from a report based on previous research. Ensure you're going to receive the information you need before you decide to pay for it.

Public libraries

Not only will your local library give you access to the internet and have shelves of books on many subjects but, behind the counter, libraries often have a lot of statistical information on local issues. Most librarians are trained to help library users track down information: all you need to do is ask. It's worth setting aside half a day to explore your issue at the library.

Surveys

These can be carried out in a number of ways: via post, which then requires recipients to respond (postal surveys often have quite a low response rate); or face-to-face interviews (which can take a lot of person hours); or you can send out an online survey which is less time consuming and can get quicker responses, but you may miss people who don't have online access.

Whichever way you conduct your survey, there are certain things you have to ensure.

- explain why you're conducting the survey, with all the key facts, e.g. 'It's planned that from 21 September the number 32 bus route starting from Llanllwch and serving Aberglân Hospital will be cancelled. We want to know whether this will affect you and how you feel about it'
- make it clear that all responses will be treated anonymously
- include 'open' and 'closed' questions.

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Open questions

An open question will let the participants speak freely and give you 'qualitative' information that can be used as quotes.

Q. When the no. 32 service stops, how will it affect you?

A. Won't be able to visit my wife as much. Might have to take taxis, which means I won't be able to afford other things. I could get a lift from my daughter but that would only be once a month. It's going to be really difficult and I'm not quite sure what to do.

Closed questions

A closed question enables you to compile statistics or 'quantitative' information, with percentage outcomes.

There are two types of closed question. For some questions there might be some very obvious answers which you can list in your questionnaire.

Q. How will you get to the hospital when the no. 32 service stops?

A.

1. Alternative bus route
2. Taxi
3. Own car/transport
4. Community transport
5. Walk
6. Lift with a friend/family
7. Other

Always include an 'other' option, just in case.

You can follow up a closed question with an open one, for example, the above question followed by:

Q. How will that affect you?

In the other type of closed question you ask participants to answer 'yes' or 'no' or 'agree' or 'disagree'.

Q. Do you use the no. 32 bus to reach the hospital?

A. Yes / No

Or

Q. Do you agree with the following statement: It will be difficult for me to get to the hospital once the no. 32 bus route is cancelled.

A. Agree / Disagree

It's sometimes worth including with this type of question a 'not sure' option, just in case.

Following a closed question, it's often useful to ask an open question, to let the participant explain why they answered the closed question in the way they did or to expand on the answer.

Q. Do you use the no. 32 bus to reach the hospital?

A. Yes No

Q. When the no. 32 service stops, how will it affect you?

A. Won't be able to visit my wife as much. Might have to take taxis, which means I won't be able to afford other things. I could get a lift from my daughter but that would only be once a month. It's going to be really difficult and I'm not quite sure what to do.

At the end of the survey you should be able to put together the outcomes by using qualitative and quantitative information.

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Quantitative information

The quantitative information comprises the answers you can count.

Q. Do you use the no. 32 bus to reach the hospital?

A. Yes / No

100 people completed the questionnaire and 96 people answered 'yes' to the above question.

Your quantitative information is: 96% of those questioned use the no. 32 bus route to reach the hospital.

Q. It will prove difficult for me to get to the hospital when the no. 32 bus route is cancelled.

A. Agree / Disagree

100 people completed the questionnaire and 82 people agreed with the above statement.

Your quantitative information is: 82% of those questioned stated that it will be difficult for them to get to the hospital when the no. 32 bus route is cancelled

Qualitative information

The qualitative information comprises the answers to the open questions and can demonstrate the effect on people and how they feel about issues. These can simply be listed to show strength of feeling or opinions.

100 people completed the questionnaire and 92 participants answered the following question:

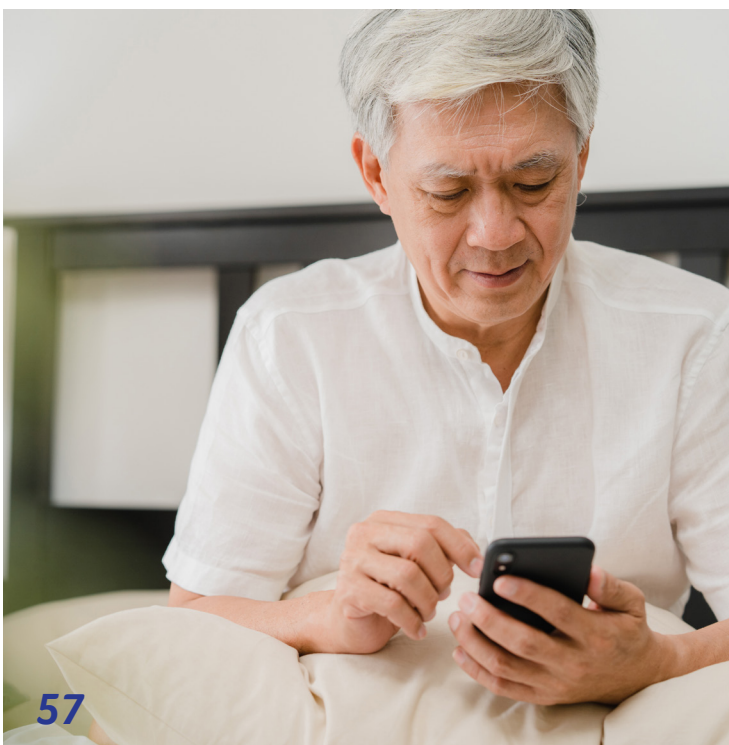
Q. When the no. 32 service stops, how will it affect you?

Negative answers

- Won't be able to visit my wife as much.
- Might have to take taxis, which means I won't be able to afford other things.
- I could get a lift from my daughter but that would only be once a month.
- It's going to be really difficult and I'm not quite sure what to do.
- I could get the number 6 and number 13 but that means the journey will increase by an hour.

Positive answers

- It'll be great. It means that my husband will have to buy me a car now.
- Fantastic. It means that I can get out of visiting my auntie.
- Remember, you can present the outcomes of your research in any way you want: as a simple text document or with graphs and charts. Decide which is best for your purposes, but a more visual approach can often have more impact.



Decision makers and issues

Campaigning

The key to successful campaigning is knowing what you want to achieve and who to contact to achieve it. When deciding who to contact, ask yourself whether your issue is local, country-wide or UK-wide.

If your issue is local, you'll have to contact your local council and/or councillor. Useful information about what a council (local authority) does is available at <https://www.wlga.wales/local-government-in-wales>

If it's a devolved Welsh issue you will need to contact your Member of the Senedd (MS).

If your issue isn't devolved, you'll have to contact your Member of Parliament (MP).

Remember

During every campaign you're part of a non-party political organisation. If your forum supports a policy that a political party also advocates the forum should make clear its independence, both to its supporters and to those people whose views it is seeking to influence

Local government in Wales

Current structure

The current structure of local government in Wales was established by the Local Government (Wales) Act 1994, which came into effect on 1 April 1996. This established 22 unitary authorities in Wales, responsible for the complete range of local authority functions.

Following the Local Government Act 2000 all Welsh authorities revised their management arrangements with the committee systems being replaced with executive governance models loosely based on the cabinet system of government at Westminster.

Elections

Local authorities are divided into electoral wards. For each electoral ward one or more councillors are elected by the voters in accordance with a scheme drawn up by the Local Government Boundary Commission for Wales and approved by Senedd Cymru/Welsh Parliament.

Regular elections of councillors are held on the first Thursday in May every four years (from 2004) or at such other time as may be set by law. The terms of office for councillors will start on the fourth day after being elected and will finish on the fourth day after the date of the next regular election.

Local authorities vary in size from 33 to 75 councillors.

Section 3: Effective issue raising

Councillors

Councillors have a dual role to play – that of shared participation in the work, policy and decisions of the council and that of representing their constituents. Councillors aren't salaried but receive allowances.

All councillors receive a basic allowance and councils may opt to allocate up to 25 per cent of their budget for basic allowance to operate an attendance allowance scheme. Councils have discretion to determine special responsibility allowances for councillors with significant additional responsibilities.

Service delivery

Local authorities have the flexibility to develop policies and deliver services in the way that best reflects local needs and circumstances. There's no need for councils to provide all services themselves. The emphasis is on finding the service delivery method which provides the best value for money to both service users and Council Tax-payers. This might mean that some council services are delivered directly, others by contractors or through a partnership with the private or voluntary sector. Authorities can also form joint committees or establish purchasing consortia to enable the provision of services and in certain circumstances they can make a request for the First Minister to form a joint board.



Relations with UK Government and the Welsh Government

The Welsh Government sets the broad policy agenda for local authorities in Wales. Local authorities are then able to translate this policy agenda into local delivery. Essentially, local authorities are independent and the management of their day-to-day business is as they see fit, responding to local needs and reflecting local priorities.

There is a statutory partnership scheme between Senedd Cymru/Welsh Parliament and local government for collaboration and consultation as required by the Government of Wales Act 1998. This recognises local government's representational and community leadership role and acknowledges local government as a partner of Senedd Cymru/Welsh Parliament rather than a service delivery agent.

The partnership is embodied in the Partnership Council for Wales, an advisory body drawn from Senedd Cymru/Welsh Parliament and local government. It promotes joint working and co-operation and informed policy development. Some areas, such as the Council Tax system, benefits, trading standards and police, remain UK government responsibilities. However, following the second Government of Wales Act, the Welsh Government will gain more powers over wider local government roles and responsibilities.

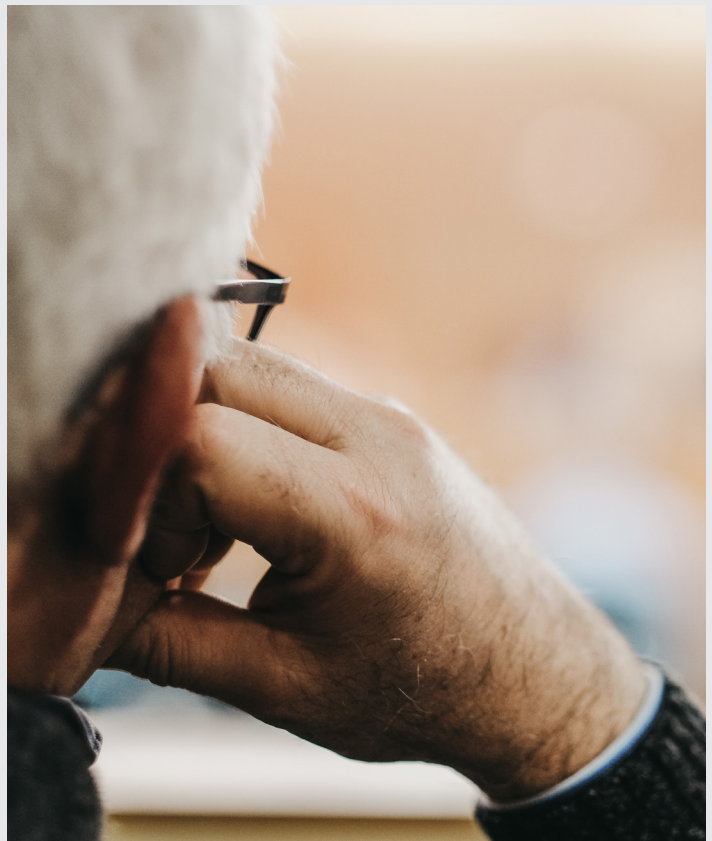
Welsh local authorities spend about £5 billion a year on their services. The sums making up this total vary considerably between larger authorities such as Cardiff and smaller ones such as Anglesey. The Welsh Government supplies 85 per cent of local authority funding, Council Tax the remaining 15 per cent.

Relations with the public

Local authorities are democratically accountable to the electorate for the discharge of their functions.

Members of the public are entitled to attend meetings of the council, its committees and sub-committees and to have access to the minutes, agendas and other relevant reports prepared for such meetings unless such attendance or access would result in the disclosure of confidential or exempt information as defined in law. The Local Government Act 1972 as amended by the Local Government (Access to Information) Act 1985, Part VA, increased the public's right to attend meetings and see documents.

Members of the public who consider that they have suffered an injustice as a result of maladministration by the council may make a complaint to the Public Services Ombudsman for Wales.



Local Government Act 2000

As a forum, why should you be interested in the Act?

In Wales, the Local Government Act 2000 placed a duty on local authorities to prepare community strategies in consultation with and after seeking the participation of appropriate persons. This statutory duty is backed up by government guidance on the preparation of community strategies, broad statutory powers for local authorities to promote the economic, social and environmental wellbeing of their communities ('the power of community well-being'), and a series of other supporting commitments.

As a community body it is in your interests and your members' interests (as they will undoubtedly be recipients of services) to be included in any consultation process regarding local services. Further to this and prior to consultation it would be beneficial to position yourselves, to ask your local authority how they're planning to involve community bodies into the community planning process and that you formally request representation from your forum on any appropriate planning groups.

It is important to remember that the purpose of the forum is to ensure the voice of older people is heard. This can be on local or national issues, but predominantly it will be local issues that bring in members and raise interest.

Since the beginning of the forum movement the majority of the work has been reactive: for example, responding to the local day centre being shut or a local bus route being stopped. These issues cause forums to become active, raising the issue and possibly making demands (e.g. that the day centre remain open or the bus route be reinstated).

The Act therefore gives forums the opportunity to be proactive: in other words, to stop an idea becoming an issue. Think about how different it would be if you had representation in a planning group that was considering closing a day centre or stopping a bus service.

The Act also demands that key agencies participate in the Community Planning Process. The key agencies are Health, Enterprise, Police, Fire and Rescue and Transport.

The majority of the issues you consider – home care, hospital waiting lists, community safety, public transport and accessibility, for example – are likely to be under the remit of either your local authority or the key agencies



Public Services Ombudsman for Wales

The office of Public Services Ombudsman for Wales was established on 1 April 2006. This replaces the previous offices of the Local Government Ombudsman for Wales, the Health Service Ombudsman for Wales, the Welsh Administration Ombudsman and the Social Housing Ombudsman for Wales.

The role of the Public Services Ombudsman for Wales is to investigate complaints by members of the public about the way they've been treated by a public body.

The Ombudsman is completely independent of government – Westminster, Senedd Cymru/Welsh Parliament and local government. Complaints will be investigated impartially.

The Ombudsman can look into complaints that you have been treated unfairly or received bad service through failure of the body providing that service. It can't, however, investigate properly made decisions which that body had the right to make but with which you disagree.



The Ombudsman considers complaints about a wide range of matters, including:

- social services
- planning
- education
- council housing
- social housing (provided by housing associations)
- hospital services
- GP services.

If the Ombudsman upholds your complaint, they will tell the public body what they consider it should do to put it right. The Ombudsman cannot force public bodies to implement their findings but in practice they almost always do.

Lessons learned from investigations will be publicised. The Ombudsman will also promote good administration and high standards of conduct by investigating allegations that local authority members have breached their own authority's code of conduct.

Public Services Ombudsman for Wales

1 Ffordd yr Hen Gae

Pencoed CF35 5LJ

Tel: 0300 790 0203

Email: ask@ombudsman.wales

Website: www.ombudsman.wales

Section 3: Effective issue raising

Parliament

The National Assembly for Wales was established through the Government of Wales

Act 1998. Powers and responsibilities were transferred from the Secretary of State for Wales to the National Assembly on 1 July 1999. In framing the devolution settlement, the UK Government made it clear that Parliament remains sovereign in all matters and that the National Assembly for Wales (as are the Scottish Parliament and the Northern Ireland Assembly) is constitutionally subordinate.

The National Assembly for Wales officially became Senedd Cymru and Welsh Parliament, commonly known as the Senedd, on Wednesday 6 May 2020. The new name reflects the institution's full status as a national parliament, with law-making powers and the ability to vary taxes. The new name, and the date for when it came in to use, is written in law in the Senedd and Elections (Wales) Act. The date was exactly one year from the scheduled date of the 2021 Senedd Elections.

Government of Wales Act 2006

The Government of Wales Act 1998 provided the Senedd with limited powers. The Senedd was also established as a single 'corporate' body incorporating both the 'parliamentary' and 'executive' functions within one legal entity. In 2005 the Secretary of State for Wales, the Rt Hon Peter Hain MP, introduced a White Paper, 'Better Governance for Wales', which set out proposals to change the current provisions and extend devolution in Wales.

The resulting Government of Wales Act 2006 came into force after the May 2007 Assembly elections. The Act:

- created a formal legal separation between the Senedd and the Welsh Government,

The Members elected to represent the people of Wales are now known as Member of the Senedd (MS).

There are 60 Members of the Senedd (MSs), who are elected to the Senedd every four years. Since 2011, members are elected for a five-year term of office under an additional member system, in which 40 MSs represent smaller geographical divisions known as constituencies and are elected by first-past-the-post voting, and 20 MSs represent five electoral regions using a method of proportional representation. Typically, the largest party in the Senedd forms the Welsh Government.

This means that every Welsh resident is represented by one constituency MS and four regional MSs.

Expenditure in the Senedd is largely funded by block grant from the UK Government.

clarifying the respective roles of the legislature and the executive

- made new provision for the appointment of Welsh Ministers, with the First Minister nominated by the Senedd but appointed by His Majesty the King (who also gives his approval to the First Minister's choice of other Ministers)
- enabled the Senedd to acquire enhanced legislative powers for matters approved by Parliament, with full legislative powers on the statute book waiting to be implemented if approved in a referendum in the future
- from May 2007, each candidate standing for a Senedd election must choose to stand either as a constituency representative or on a regional list

Section 3: Effective issue raising

Issues dealt with by MSs

There are 20 areas of devolved law that MSs can deal with:

Field 1: agriculture, fisheries, forestry and rural development

Field 2: ancient monuments and historic buildings

Field 3: culture

Field 4: economic development

Field 5: education and training

Field 6: environment

Field 7: fire and rescue services and promotion of fire safety

Field 8: food

Field 9: health and health services

Field 10: highways and transport

Field 11: housing

Field 12: local government

Field 13: Senedd Cymru/Welsh Parliament

Field 14: public administration

Field 15: social welfare

Field 16: sport and recreation

Field 17: tourism

Field 18: town and country planning

Field 19: water and flood defence

Field 20: Welsh language

How to contact your MS

Your MS can be contacted at their constituency office or at the Senedd.

Tel: 0300 200 6565

They welcome calls from Relay UK

You can also write to your Member of the Senedd:

Senedd Cymru

Cardiff Bay

Cardiff CF99 1NA

Or email using the following format: `firstname.lastname@senedd.wales` or alternatively you can find your local MS on the Senedd Cymru website along with their contact details: [senedd.wales/find-a-member-of-the-senedd](https://www.senedd.wales/find-a-member-of-the-senedd)



Section 3: Effective issue raising

The UK Parliament

The UK Parliament is based on a two chamber system. The House of Lords and the House of Commons sit separately and are constituted on different principles. However, the legislative process involves both Houses.

Parliament has three main functions:

- to examine proposals for new laws;
- to scrutinise government policy and administration;
- to debate the major issues of the day.

The elected representatives are known as Members of Parliament, or MPs. For Wales, there are 40 constituency members, elected using the 'first past the post' system.

Issues dealt with by MPs

MPs deal with issues that are reserved to the UK Parliament. They include all matters that aren't listed above as devolved, but specifically:

- constitutional matters
- civil and criminal matters
- UK foreign policy, UK defence and national security
- macro-economic policy and taxation
- immigration and nationality
- overseas trade
- energy
- competition and consumer protection
- some aspects of transport, including safety and regulation
- employment legislation
- social security
- broadcasting
- gambling and the National Lottery
- data protection
- abortion, human fertilisation and embryology, genetics and vivisection
- equal opportunities.



How to contact your MP

MPs can be contacted at their local constituency office or at the UK Parliament:

House of Commons

London SW1A 0AA

Switchboard tel: 020 7219 3000

Section 3: Effective issue raising

Your first contact with your political representative may well be a visit to their local surgery or constituency office. However, there are times when it may be better to contact him or her in writing.

While some people think that writing letters to politicians can be a waste of time, it's estimated that every letter received by a politician represents about 80 people who care but haven't got around to writing.

That's why politicians take notice of letters – each could potentially represent at least 80 votes.

The best way to have influence through letter writing is to write to your own MS/MP asking her or him to raise the issue with the relevant Minister. That way both your MP and the Minister become aware of the issues. By convention, a letter forwarded by an MS/MP to a Minister must receive a reply.

When writing to your MS/MP:

- be polite and concise: try to keep to one side of paper
- write in your own words: don't just copy the text from somewhere else – make it personal
- tackle just one subject in a letter
- plan your letter carefully: letters can be wasted, along with all your effort, if the MS/MP does not know what is expected of him/her, so ask for something concrete, such as a meeting, or their support in an important vote
- if the issue is close to your heart, say so: mention your own personal experience, or how the issue has affected a member of your family
- adding an individual or personal angle to the letter is more likely to attract the MS's/MP's attention and provoke a personal reply: all MSs/MPs claim that they take notice of personal letters;
- always be polite, and fairly formal
- always close your letter with the line 'I look forward to your reply', otherwise your MS/MP may not respond.



Section 3: Effective issue raising

Freedom of Information Act 2000

Since January 2005 you have had the legal right to see information from 'public authorities'. The Freedom of Information Act (FoIA) gives you the right to ask for and be given information from a wide range of public organisations including:

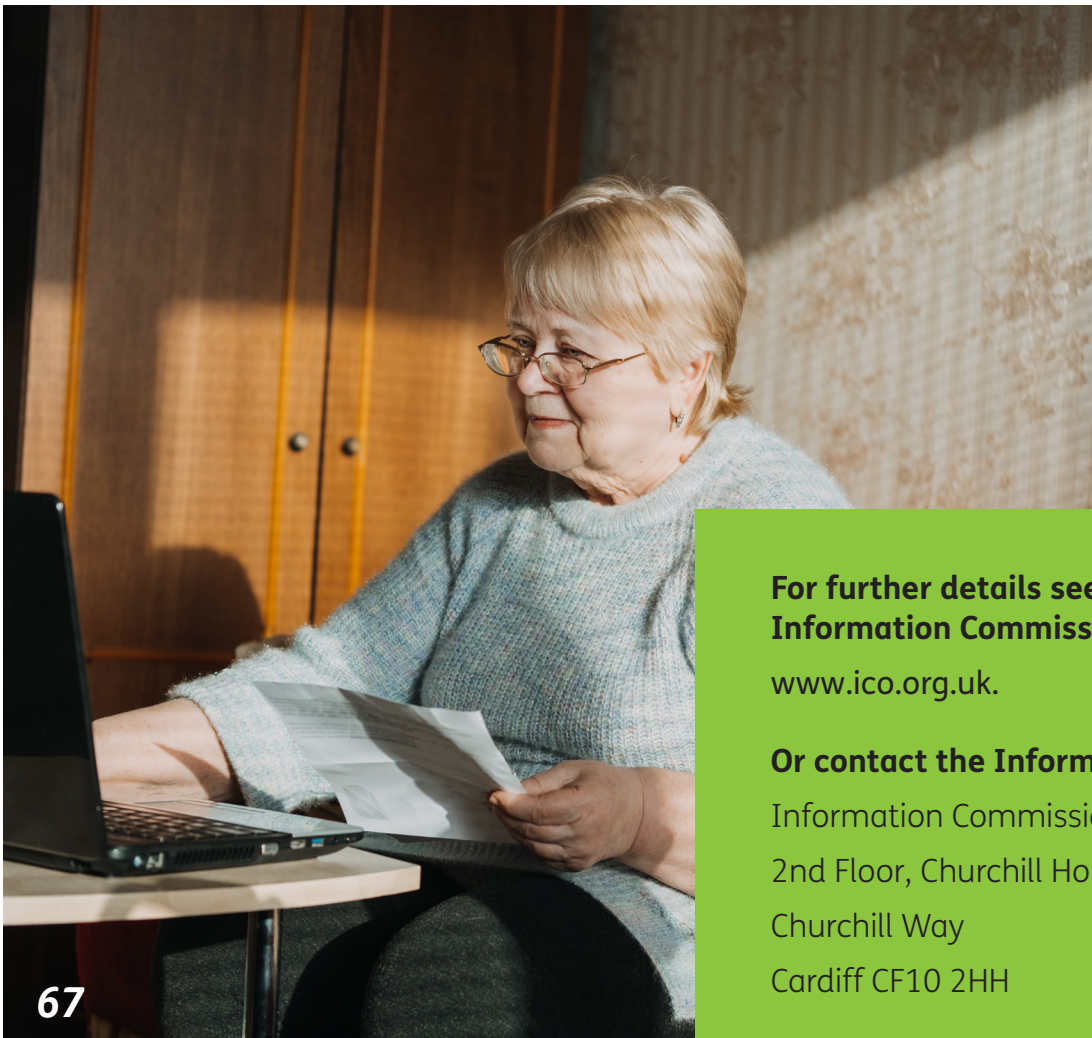
- central and local government
- the health service
- schools, colleges and universities
- the police
- other non-departmental public bodies, committees and advisory bodies.

You may want to use your rights to ask, for example:

- why decisions affecting local services were made, such as a decision to cut back services at a local hospital, or to combine primary schools
- how public authorities decide who is prioritised on waiting lists for services such as health or housing.

Or you may want to find out about:

- the contract under which a private company is providing a service for a public authority, such as a traffic warden service, including perhaps the details of its charges or conditions for providing the service
- any studies carried out or considered before decisions are taken on, for instance, the safety of vaccines or medicines.



For further details see the website of the Information Commissioner's Office:

www.ico.org.uk.

Or contact the Information Commissioner:

Information Commissioner's Office – Wales
2nd Floor, Churchill House
Churchill Way
Cardiff CF10 2HH



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