

# Trade Union and Labour Party Liaison Organisation

## **TULO HANDBOOK**

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a practical guide to building the link between the Labour Party and affiliated trade unions at a local level



# Introduction

TULO is built upon the principle of strengthening the link between the Labour Party and its affiliated unions at every level. It has been said time and again that 'all politics is local', and that is certainly the case when it comes to building a vibrant and effective partnership between the unions and the Party.

The TULO Handbook is designed to facilitate that process, and contains a wealth of resources for local activists to establish and develop strong relationships between their CLP and local unions, for the benefit of all concerned.

Whilst it is primarily intended to support the work of Trade Union Liaison Officers in CLPs and TULO Co-ordinators appointed from the unions at election time, the Handbook could just as easily be used by other CLP Officers and activists, or MPs or other elected representatives and their staff to build the link. It contains a menu of activities that can be undertaken by activists in constituencies – including those that are just beginning the process of establishing relations between the unions and the Party, and those where those links already exist, and need to be strengthened and utilised.

Over recent years, TULO has played a key role in delivering electoral success for the Labour Party, including at the 2005 General Election. In 2006, TULO piloted its new electoral strategy at the local elections in London with considerable success.

That strategy will be rolled out across the country over the coming months, and the process of building the link at a local and regional level will be at its heart. Whether it's organising Policy Forums for trade unionists, MPs' visits to workplaces, or encouraging branch affiliations to CLPs – increasing dialogue between union members and the Party is essential.

This Handbook is split into a number of sections, which will be useful to different activists at different times – however, once you have familiarised yourself with TULO and with the role of CLP TULO Officers and TULO Co-ordinators in Chapters 1 and 2, the first port of call should be Chapter 3: Auditing involvement and building links. Making a comprehensive assessment of your local Party's links with each of the affiliated unions will stand you in good stead for all the other activities you might want to undertake.

You will likely find that the key to building the link locally is knowing who to contact in each of the unions in order to get things done – you will need to use this Handbook in conjunction with the TULO Directory. Published every year, the Directory will be an invaluable resource when building relationships with people inside Labour's affiliated unions. You can access the information and download a copy at [www.unionstogether.org.uk/contacts](http://www.unionstogether.org.uk/contacts).

All the resources in this handbook, such as model letters and flyers, are available to download at [www.unionstogether.org.uk/handbook](http://www.unionstogether.org.uk/handbook).

If you have any questions or need any support at all, contact the TULO Regional Officer on 020 7783 1166 or email [tulo@new.labour.org.uk](mailto:tulo@new.labour.org.uk)

# Trade Union and Labour Party Liaison Organisation

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### TULO's background

TULO has existed in its current form since 1994, and was set up following a motion at the Labour Party's Annual Conference. Prior to this, there were several organisations that worked to co-ordinate trade union support for Labour at election time, such as Trade Unions for a Labour Victory.

TULO has taken on a different role from previous organisations – it was expressly created to prevent a Labour government from running into problems in its relationship with the affiliated unions like those that occurred in the 1970s. Between elections, TULO operates in a communication role, and at election time it co-ordinates trade union support for the Party and for Labour candidates.

### The Labour Party and the unions – a shared history

The Labour Party was formed out of the trade union movement at the turn of the 20<sup>th</sup> Century, after the vote had been extended to working-class men and it had become clear that a political party was needed to represent the interests of working people. In 1900, a special conference set up the Labour Representation Committee, which was charged with co-ordinating support for parliamentary candidates. Becoming the Labour Party in 1906, their representation in Parliament gradually increased, and Labour formed their first Government in 1924. But it was the post-war landslide Labour victory of 1945 that gave the opportunity to implement real changes – Labour's manifesto, Let Us Face the Future, captured the public mood for change. It argued that Britain must not return to the poverty and lack of work of the 1930s. Labour pledged to destroy the five 'evil giants' of want, squalor, disease, ignorance and unemployment.

The unions have remained at the heart of the Labour Party from its inception to the present day, and are represented at every

level of the Party. It was Labour's direct link to the unions that resulted in the negotiation of the historic Warwick Agreement in 2004, which formed a key part of Labour's General Election manifesto. Amongst many other things, the Warwick Agreement included a commitment to ensuring that bank holidays cannot be counted as part of employees' four weeks statutory holiday entitlement, and equal protection for agency and temporary workers.

### TULO's set-up

TULO is a separate body from both the Party and the trade unions, although its National Office is located in Labour Party Head Office, and its funding is derived from the £3 fee per member that unions pay to affiliate to the Party.

TULO currently has three permanent members of staff: a National Officer, a Regional Officer and a Campaigns Officer. These staff exist to service the link between the Party and the unions. The National Officer acts as Secretary to the National TULO Committee and has responsibilities for liaison at the national level, which tends to be a mainly political affair. The Regional Officer's responsibilities cover liaison between the Party and unions within the regions across the country, which tends to be more organisational in its nature. The Campaigns Officer is responsible for campaigns and communications, and for rolling out TULO's election strategy.

### TULO's structure

TULO can be said to operate on three levels – local, regional and national. Effective liaison between the Party and the unions at each of these levels is essential if the link is to be beneficial to all concerned.

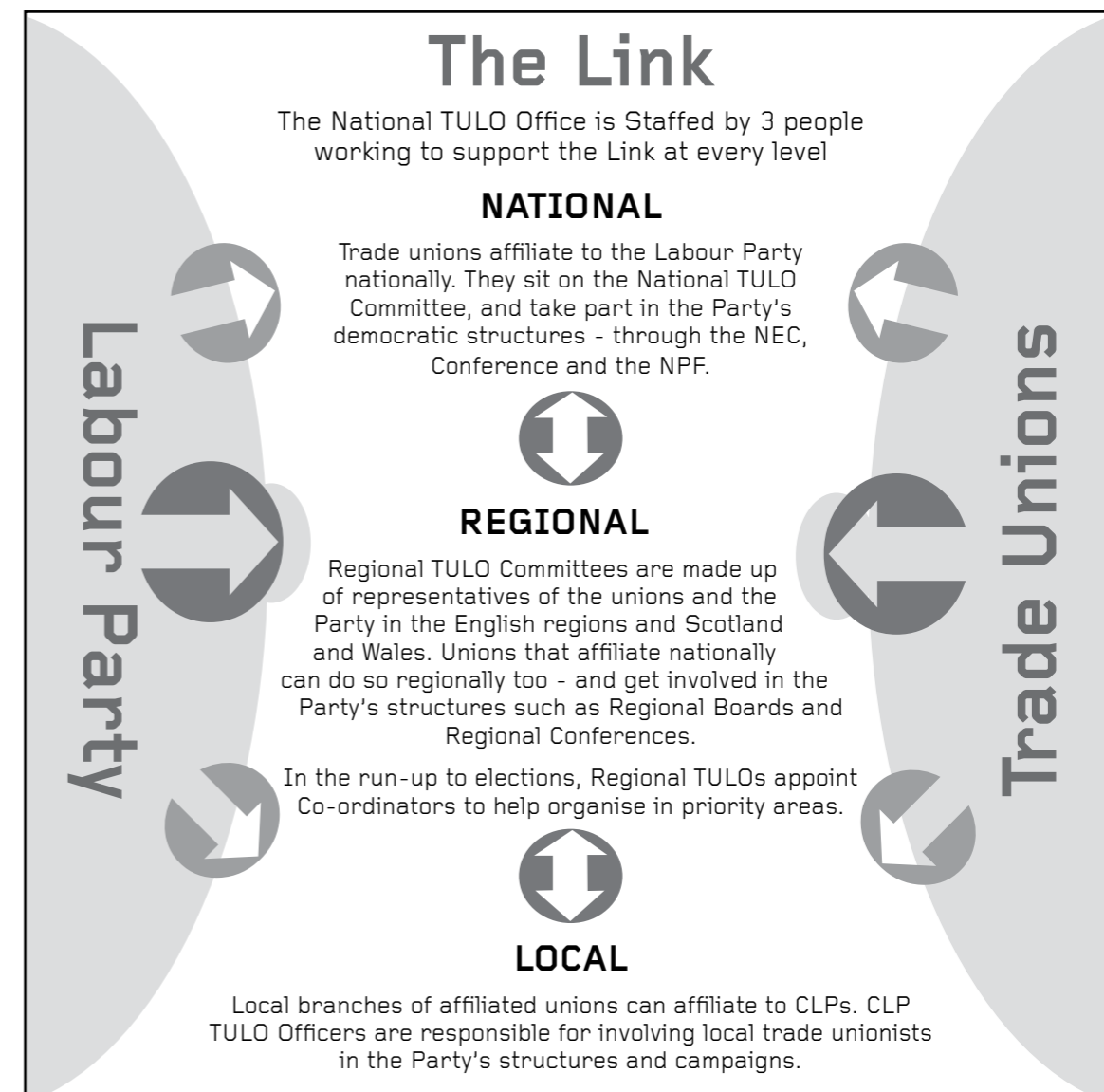
This diagram opposite shows the three levels at which the Party and the unions interact, and the rest of this section outlines each of them in more detail.

### National TULO

Nationally, TULO is co-ordinated by the National TULO Committee. This is made up of the General Secretaries of all of Labour's affiliated unions, plus senior representatives of the Party and government. Whilst National TULO is a formally constituted body, its proceedings tend to be more informal, with decisions made by consensus. Its nature as a forum for communication and dialogue means that the views of the unions' leaders on a range of issues can be made clear to key figures in the Party. These issues might range from the arrangements for contemporary resolutions (debates on topical issues) at the

Party's annual conference to discussions on election strategies.

There are, of course, many other ways in which the unions input into the Party's structures and proceedings. The affiliated unions make up a key part of the Party, and this is reflected by the unions being represented on all Party bodies. Unions send delegates to the Labour Party's Annual Conference, get a number of seats on the National Executive Committee as well as on the National Policy Forum. They also make up an important part of the electoral college that elects the Party's Leader and Deputy Leader.



### Regional TULO Committees

TULO operates in each of the 9 English regions, and in Scotland and Wales, in much the same way as it does nationally. Each region and nation has its own TULO Committee (in Scotland it is called STULP – Scottish Trade Union and Labour Party Committee). The structure of these Committees mirrors the make-up of National TULO, with each comprising senior regional officials of the affiliated unions and the Regional Directors / General Secretaries of the Labour Parties in the English regions and Scotland and Wales. The structure of the Committees is quite fluid, however, and varies from region to region – for example, in some regions MPs, MEPs or MSPs attend the meetings

These Committees are the main forums for interaction between the Labour Party and the unions at a regional level. Although most regional Labour Parties also have individual links with each union, TULO allows communications to occur between the Party and the unions as a collective. The Regional TULOs also provide an opportunity for organising trade union activity in support of the Labour Party both during and between elections. Additionally, the Labour Party's regional democratic structures allow for representation of the affiliated unions on the Party's Regional Boards and at the Regional Conferences.

### The link at a local level

The link does not just operate nationally and regionally; across the country, the Labour Party and its affiliated unions work together in all sorts of ways – from unions being formally affiliated to Constituency Labour Parties and being represented in the local Party's democratic structures, to hosting policy forums to engage trade unionists in the Party's policy development process.

The link is crucial at a local level – it is locally that partnerships are formed and relationships built that can deliver a real voice for trade unionists within the Party, as well as the trade union support that really makes a difference at election time. These local relationships cannot be established from a national or regional office – they rely on local activists in the Party and the unions to put time and effort into developing them.

**The last chapter talked about the crucial importance of the link at a local level – CLP Trade Union Liaison Officers, and TULO Co-ordinators from the unions are those tasked with building strong relationships between the Party and the affiliated unions locally.**

To begin with, it is important to set out who CLP TULO Officers and TULO Co-ordinators are, and the differences between them.

It is difficult to specifically define the roles and remits of CLP TULO Officers and TULO Co-ordinators – these will vary hugely dependent on local circumstances. In some cases relationships may need to be built almost from scratch, in others they may need to be maintained and built upon – different tasks will need to be undertaken in each of these scenarios, and in those in-between.

Similarly, the way that CLP TULO Officers and TULO Co-ordinators share out tasks will vary according to their local situation. However, this chapter aims to set out broad job descriptions for both roles, in order to guide people working locally. These should not be seen as hard and fast lists of tasks to be undertaken, but rather a starting point for putting together a local plan of action.

The two job descriptions should be read in conjunction with one another, as the nature of the roles means that there will be a great deal of overlap, particularly with regards to organising for elections. However, CLP TULO Officers are also encouraged to work more broadly to build the link outside of election time.

### CLP TULO Officers

CLP TULO Officers (Constituency Labour Party Trade Union Liaison Officers) are activists in local Labour Parties, who are elected to the role at their CLP's Annual General Meeting. Each CLP should have a TULO Officer in place all year round, and at all points in the electoral cycle, in order to build links with local unions.

### TULO Co-ordinators

TULO Co-ordinators are lay or full-time officials of the affiliated unions, who are asked by regional TULO Committees to work with CLP TULO Officers to maximise union support for the Labour Party in priority areas in the run-up to elections. The amount of time before an election that TULO Co-ordinators are appointed will vary, as will the area that they are co-ordinating (it could be one key constituency, a borough, or a larger geographical area).

Trade  
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### Job description: **CLP TULO Officers**

**Objective:** To work all-year-round and throughout the electoral cycle to build strong links between their CLP and local trade unions, in order to give trade unionists an effective voice within the local Party, and to ensure the unions are in a position to provide organisational support for the Party during elections.

**Activities:** The activities that can be undertaken to build the link between the Party and its affiliated unions are many and varied – but doing a full audit of union involvement in the CLP, and putting together a local contacts database is an important place to start. This list of activities should provide inspiration for CLP TULO Officers looking to put together a plan of action.

- Auditing the formal and informal links that the CLP has with local trade unions, in order to highlight both gaps and existing relationships.
- Building a comprehensive database of local union contacts, including full-time officials, shop stewards and local unionised workplaces.
- Organising regular Labour Forums – an opportunity to ensure dialogue between local trade union members and officials and the Labour MP or other elected representatives.
- Working to increase union affiliations to the local CLP, and to maximise attendance of those affiliated unions.
- Ensure the CLP has a Constituency Development Plan with a trade union, and that it is fulfilling the agreement
- Organise events in order to increase the involvement of trade unionists in the CLP. There are many events that could be co-ordinated, but this list should provide some ideas:
  - » policy forums;
  - » Q and A events with Ministers, local MPs or local councillors;
  - » social nights;
  - » working with local union officials to organise a phone bank to recruit trade union members to the Party;
  - » regular campaigning evenings; or
  - » MP visits to local workplaces.

**Working at election time:** At election time, TULO Officers in key seats will need to work closely with the TULO Co-ordinators that have been appointed by the unions to cover the area. TULO Officers should play a leading role in organising the activities outlined in the Job Description for TULO Co-ordinators on the next page. The TULO Co-ordinators exist in order to act as a bridge between the CLPs and the trade unions – they will be able to assist you in getting the access you need to deliver maximum trade union assistance for the Labour campaign in the run-up to elections.

It is important to remember that TULO Co-ordinators are likely to be full-time officials of the trade unions – whilst they can be of support to you, their primary responsibility is to their members, so other work may well have to take priority. The more you are able to take a lead in delivering the election work, the likelier it is to be successful.



### Job description: **TULO Co-ordinators**

**Objective:** To maximise and co-ordinate trade union assistance for the key seat or area they cover. In practice, this means securing resources for the campaign in line with what has been decided by local Labour Parties, and what will fit inside their election expense limits.

**Working together with CLP Trade Union Liaison Officers:** An important part of TULO Co-ordinators' role is acting as a point of contact for TULO Officers in CLPs. Together with Co-ordinators, these local volunteers are jointly responsible for co-ordinating trade union assistance in the run-up to elections, and also take lead responsibility for building the link between their local party and the unions all year round.

The way that work is shared between the Co-ordinators from the trade unions and the TULO Officers in CLPs will vary dependent on local circumstances, but Co-ordinators should view themselves as having a facilitating role – acting as the gateway to the trade unions in the region. Many CLP TULO Officers will not have vast experience of trade unions, or will only be knowledgeable about their own union's structures.

Building a strong working relationship with TULO Officers as early as possible, and supporting them in knowing how to access local workplaces, union officers and shop stewards, will enable them to take the lead during election time.

**Activities:** A variety of activities are required in order to maximise and co-ordinate trade union assistance for key seats and priority areas, but the following list of activities should be viewed as the core functions required. The way that the workload is shared between TULO Co-ordinators and CLP TULO Officers will vary; however, the more support that CLP TULO Officers are given early on, the more of the work they will likely be able to take on closer to the election.

- Compiling a comprehensive contact pool of local unions, including full-time and branch officers, workplaces and shop stewards.
- Working to consolidate links that CLPs already have with local unions, and to build new relationships where they do not already exist.
- Communicating with local union branches and regional offices to mobilise officers and activists as volunteers in the campaign.
- Organising a monthly 'TULO Campaign Evening', working to maximise attendance from trade union activists and officers, and build a relationship with attendees in order to make them more active in the campaign.
- Contacting local union branches in order to maximise donations to the campaign.
- Asking unions' regional offices for other kinds of support, such as franking mailings, providing phone lines for telephone canvassing, or volunteering drivers to help with the campaign.
- Asking union full-time officers and shop stewards to put up posters and distribute postal vote application forms in local workplaces.
- Working with the campaign organiser to co-ordinate visits of the candidate to local workplaces.

Chapter 2 gave you an idea of some of the activities that CLP TULO Officers or union TULO Co-ordinators can undertake. Much of the rest of this handbook is dedicated to providing you with more advice about how to go about co-ordinating campaigning or events with trade unionists.

However, whilst there are many different activities that you can arrange, each of them will require an understanding of how the unions are organised locally, and who to contact in order to get things done.

This chapter outlines how to go about auditing union involvement in your CLP, and building a database of union contacts. This information will be needed when undertaking any other activities so, whilst it may be a painstaking process, it is also an essential one.

### Conducting the audit

Gaining an idea of the relationships that your CLP has with local unions might seem a daunting task – there are likely to be both formal and informal links, and these might have altered over time. However, undertaking this kind of audit can be broken down into three stages:

- finding out what formal links already exist (affiliations, CDPs)
- finding out what informal links already exist
- if you have a Labour MP, or other elected representatives, finding out what union links they have.

### Formal links

This should be the easiest part of the audit. Formal links can exist between trade unions and CLPs in two ways – branch affiliations or Constituency Development Plans.

Under Labour Party rules, individual branches of nationally affiliated trade unions can affiliate to their local CLP. This gives them access

to the local Party's democratic structures and the right to send representatives to the General Committee (GC). Affiliated trade unions and CLPs can also sign Constituency Development Plans – whereby the union provides funding for the CLP in return for the Party agreeing to undertake certain specified activities.

All of these formal links should be well-documented. Ask your CLP's Secretary for the following information:

- Does the CLP have a Constituency Development Plan (CDP) with a particular union? If so, what are the contact details for the person in the union responsible for it?
- What union branches are affiliated to the CLP? What are the contact details of the branch secretaries?
- Which affiliated union branches send a delegate to the CLP? What are their contact details?
- Are there any branches that used to affiliate but don't anymore? If so, what are their contact details of the branch secretaries?

### Informal links

Whilst auditing the CLP's formal links with local trade union branches should be fairly straightforward, finding out about the more informal links may involve a little more work. Informal links between the local Party and unions could take many forms. There could be officers of unions that happen to be involved in the CLP, there could be lots of CLP activists who are also members of the same union or union branch, or there could be historical links to a particular union.

Ask your CLP Secretary to provide you with a list of Labour Party members whose trade union membership is known.

This is all useful information to have – but it is the sort of information that may not be written

down and filed somewhere. You may need to ask around officers and activists of the CLP to gain an understanding of these informal links with trade unions.

### Your elected representatives' links

If you have a Labour MP, they will no doubt have links to one or more unions, as will other elected representatives – MEPs, MSPs, AMs, GLA Members and Councillors. Speak to them in order to find out what links they have, and how they can help you to strengthen links between the CLP and local unions. Be sure to ask your Labour candidates what union links they have too.

### Building a picture of local unions

Once you have gained an understanding of the CLP's existing links with trade unions, you will need to build a picture of the local structure of the unions. This will not be an easy task, as no two unions are the same, and the geographical regions that they operate within vary from union to union. Similarly, the unions' branch structures also vary – some have branches tied to large workplaces, some to a number of workplaces, some have sector-based branches, and others may have no branches in your constituency at all.

You will need to use the TULO Directory to contact each union's regional office to ask them for a list of branches sitting within your constituency's boundaries, and for the name and contact details of their Full-Time Officers with responsibility for those branches. Gaining this information will not be easy and may take time – a union's main concern is serving its members' interests, and providing this information to you might well be given lower priority – be prepared to follow up letters and phone calls and chase information to complete your database. Bear in mind that some unions will simply not give out the contact

details of their branches. If this is the case, then there are ways to work around this knowledge gap – for example, asking the union to write to its branches on your behalf.

Once you have assembled this database, it will be of great use to you in a number of activities. From organising a trade unionists' social, to mobilising union activists at election time – knowing who your local contacts are is essential.

### Affiliations to your CLP

The union contacts database that you have created, and the results of your involvement audit, will need to be used together with the TULO Directory in order to increase union affiliations to your CLP.

The first step is to gain an idea of which branches do not currently affiliate – this should simply be a case of comparing the results of your audit to the list of union branches that you identified.

Once you have ascertained where the gaps in branch affiliations are, you will need to find out where to go next. The unions have varied structures for managing and funding branch affiliations to CLPs. In some unions, the power and budget for affiliations rests with the branches, in others it is decided at a regional level, and in certain unions the authority lies in the national political office.

Knowing this information is essential in being able to target your invitations to affiliate at the right level. The table overleaf tells you how each union makes decisions about local affiliations:

Union	At what level are decisions about affiliations made?	Where does funding for affiliations come from?	Who should you contact for more information?
<b>ASLEF</b>	Local branches decide whether to affiliate.	Branches fund affiliations themselves.	National Political Officer
<b>BECTU</b>	Local branches decide whether to affiliate.	Head Office pays affiliation fees.	National Political Officer
<b>BFAWU</b>	Local branches decide whether to affiliate.		National Political Officer
<b>Community</b>	Local branches decide whether to affiliate.	Head Office pays affiliation fees.	National Political Officer
<b>CWU</b>	Local branches decide whether to affiliate.	Branches fund affiliation fees, but these are refunded by Head Office.	National Political Officer
<b>GMB</b>	Decisions about affiliations are made by regional committees.	Regional committees fund affiliations.	Regional political contact
<b>Musicians Union</b>	Decisions about affiliations are made by regional committees.	Regional committees fund affiliations.	Regional political contact
<b>NACODS</b>	NACODS are a very localised union – contact Head Office for more information.		
<b>NUM</b>	Contact National Secretary for more information.		
<b>TSSA</b>	Local branches decide whether to affiliate.	Head Office pays affiliation fees.	National Political Officer
<b>UCATT</b>	Local branches decide whether to affiliate.	Branches fund affiliations themselves.	National Political Officer
<b>UNISON</b>	Branch members of the affiliated political fund can decide to affiliate to CLPs.	Regional offices fund affiliations.	Regional Political Officers
<b>UNITE (Amicus section)</b>	All branches are entitled to affiliate to CLPs within their area. These affiliations are processed at the regional level.	Funding for CLP affiliations comes from the National Political Fund.	Regional Political Officer
<b>UNITE (TGWU section)</b>	Local branches decide whether to affiliate.	Regional offices fund affiliations.	National Political Officer
<b>UNITY</b>	UNITY is concentrated in the Stoke area. Currently all branches are affiliated to CLPs. Contact the National Political Officer for more information.		
<b>USDAW</b>	Local branches decide whether to affiliate.	Head Office pays affiliation fees.	National Political Officer

Please refer to the TULO Directory for relevant contact details  
[www.unionstogether.org.uk/contacts](http://www.unionstogether.org.uk/contacts)

Each union has their own page in the TULO Directory, outlining their national and regional contact details. Use the table on the left, the contact details in the Directory and the contact database you have built up to write to the appropriate person to invite local branches to affiliate to your CLP. In many cases this will be the union branch secretary, but with some unions you will also need to contact the regional office.

The model letter overleaf might help you when you are drafting your letters about affiliation. However, bear in mind that if you can add any specific details it may make the branch more likely to want to affiliate – for example, if the union branch has been affiliated in the past.

Follow up formal letters with a telephone call to introduce yourself – this will enable you to gain a better idea of the way that the union functions and the personalities involved, and will also help you begin the process of building relationships with local union officials.

Bear in mind that not all union full-time officers or branch secretaries are supportive of the Labour Party. Some union branches may not affiliate for political reasons, so don't expect a 100% success rate. Similarly, don't expect to get an answer right away – it takes time for decisions to be made through unions' democratic structures. Don't be afraid to telephone to ask how things are progressing.

Union and Labour Party Liaison Organisation



Ms T Unionist  
Branch Secretary  
Anytown Branch, Any Union  
123 City Road  
Anytown AN7 6AJ

Freda Bloggs  
Trade Union Liaison Officer  
Anytown CLP  
16 Somewhere Road  
Anytown AN1 1AA

Tel: 01134 123 456  
Email: TULO@anytownlabour.org

Dear Ms T Unionist

I am writing to you in my capacity as the Trade Union Liaison Officer for Anytown Constituency Labour Party (CLP). We are currently trying to improve our links with Anytown's local trade unions, and noticed that your branch is not affiliated to our CLP. Over fifty members of Anytown Labour Party's members are also members of your union, so I felt it would be appropriate to write to you to invite you to consider affiliating.

The Labour Party has strong historic links with the trade unions and, as you know, your union affiliates to the Party nationally. It was due to this link between the Party and its affiliated unions that the Warwick Agreement was negotiated between the before the 2005 General Election – the programme of action for the third term that formed a key part of the manifesto. Amongst many other things, the Warwick Agreement included a commitment to ensuring that bank holidays cannot be counted as part of employees' four weeks statutory holiday entitlement, and equal protection for agency and temporary workers.

It is crucial that trade unionists are involved in the Party at every level – it is by trade union members making their voices heard through the Labour Party's democratic and policy-making structures that we can ensure that Labour continues to push forward policies that make a difference to the lives of working people. Affiliating your branch to Anytown CLP will give you the chance to get involved in making all sorts of decisions – from selecting Labour's local candidates to submitting motions to Party Conference. I am sure you'll also agree that no-one wants a return to the days of Tory misrule, so it is vital that members of the Labour Party and the trade unions continue to work together.

If you want to discuss this any further, I do hope you'll get in touch – my telephone number and email address are at the top of this letter. I am really keen to build a strong partnership with local unions, and I hope you will want to get involved too.

Yours sincerely

**Freda**

Freda Bloggs  
Anytown CLP Trade Union Liaison Officer



### Turning affiliation into active involvement

Getting branches of trade unions to affiliate to your CLP is the first hurdle. But once you have overcome it, it is important to think about translating those affiliations into activity. Some union branches will be very enthusiastic about getting involved in the CLP and the Labour Party's structures and processes – others may be less so. This will likely depend on the personalities involved.

Through conducting your audit of involvement, and through having worked to affiliate union branches to the CLP, you will likely have become aware of which union branches are actively involved, and which are not. Asking your CLP Secretary which affiliated union branches regularly send delegates to the GC will also help you identify those that are not as involved.

Begin by putting together a list of those branches that do not send delegates, and those who do not attend regularly. Start by calling the branch secretaries to introduce yourself and check that the information you have about who their delegates are is up to date – it may be that the delegates they originally nominated are no longer active. Explain that sending a delegate is an important part of making the union's voice heard within the party, and ask them to suggest someone to attend. Remember that union delegates to the GC will also need to be individual members of the Labour Party and live in the Constituency.

As part of your audit, you should also have an idea of which union CLP members are in – this may be a good way of identifying potential union branch delegates.

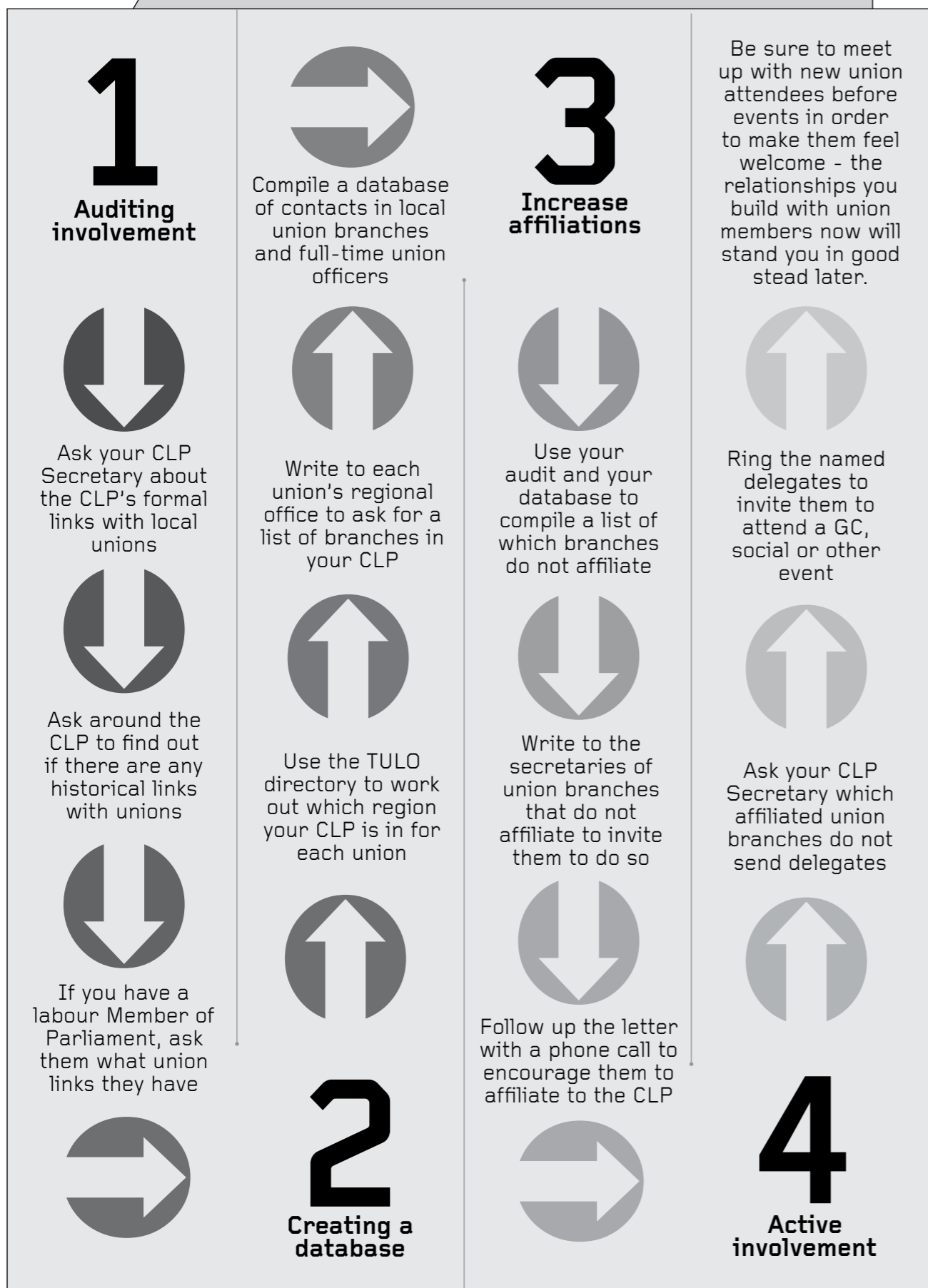
Once you have an up to date list of who the unions' delegates should be, you will need to begin making contact with them directly. The best way of doing this is probably by telephone – that way you can

try to work out the reasons that they have not attended so far, and persuade them to come in future. Remember that there could be lots of reasons for their not having been an active delegate – the meetings might be at a time that is inconvenient, or perhaps they have not been to a Labour Party meeting before and simply don't know what to expect.

Be realistic with the delegate about what GC meetings are like. Sell the good points, if you have interesting debates or guest speakers, but if the meetings are poorly attended or lacklustre then don't oversell them. It might be better to try and involve the delegate in other ways (such as at social events or a fundraising night) than have them come along to a meeting and be reluctant to come back!

Whether it's a social, a GC or a campaigning evening that you convince a union member to attend, be sure to make them welcome on the night. Offer to meet them at the beginning so that they don't have to arrive on their own, and ensure that they are looked after. Explain to them what is going on, and do everything you can to make sure they have an enjoyable time and want to come back and get more involved.

## 4 steps to build the link



At some point you will no doubt want to organise some kind of event for local trade union members. These events could take many forms, and the specific audiences may vary, but the basic organisational principles will remain the same.

This chapter will go through the steps needed to plan, organise and follow-up a successful event for trade unionists. It will outline a plan for a social event or a Policy Forum, but it will also be useful if you are planning other kinds of events too.

Following these steps should help ensure any event goes well:

- 1. Pre-planning:** thinking about who you want to invite and what sort of event will be effective.
- 2. Getting the logistics right:** ensuring the logistics of the event are well organised.
- 3. Audience-building:** sending out invitations in plenty of time, and following them up.
- 4. Planning the itinerary:** getting it right on the day.
- 5. A welcoming event:** making attendees feel welcome.
- 6. Building relationships:** following-up after the event.

### 1. Pre-planning

You will want any event that you organise to be effective and interesting for you and for the attendees. Before you begin to plan the details, it is important to think hard about what sort of event you want to organise, and who you wish to invite.

If it is a get-to-know-you event for trade union members, then it may well be a social is a good idea, or you might prefer to organise a policy forum or Q&A with your local Labour MP. There are no hard and fast rules for what sort of events to organise – use your judgement and think about what you want to get out of it.

Similarly, there are lots of options when it comes to deciding who you want to invite. Who you choose to invite will depend upon lots of things, including the nature and size of the unionised workplaces in your constituency, and whether you want to co-ordinate lots of smaller, specialised events, or fewer larger ones. You will also need to think about how you are going to contact people to invite them – the next section on audience-building goes into this in more detail, but certain audiences will be easier to get in touch with than others.

These are some of the options for different audiences you could invite, or you might want to mix and match:

- all trade union members in the constituency;
- all members of one large union branch;
- all shop stewards in the constituency;
- shop stewards from one large workplace; or
- all full-time officers with responsibility for the area.

When deciding who to invite and what to organise, think about what you want to get out of the event, and what sort of events different audiences might find useful - see the table on page 19 for more information. For example, if you are looking to recruit union members to the Party, then inviting all local union members to a get-to-know-your-MP social might be a good idea.

You also need to decide if you want to make your event exclusively for trade union members, or if you want to invite lots of members of the CLP too.

Remember that the event will be an event of the CLP – you will need to speak to the other Officers of the Party and get their agreement for it to go ahead. This will hopefully mean you have access to CLP funds, and some extra volunteers to help you co-ordinate the event.

# Trade Union and Labour Party Liaison Organisation

## 2. Getting the logistics right

Once you have decided on the type of event you want to organise, you will have to start co-ordinating the details.

Some of these decisions will depend on what sort of budget you have (does the CLP have some funds you can use, or could a union sponsor the event?), and you will need you take your local situation into consideration.

Before you send your invitations you will need to make some key decisions – this list will help you to make some decisions about the logistics of the event.

### Venue

- » Is it central?
- » Is it easy to get to by public transport?
- » Is the room appropriate for the type of event you are holding?
- » Will it cost money to hire it?
- » Is parking available?

### Time and date

- » When would be convenient for the target audience?
- » Is it a time that might limit people coming (eg, during school holidays)?
- » Is it a time and date that the local MP and officers of the CLP can make?

### Food and drink

- » Do you want to provide food and drink, and if so will it be free (never underestimate the lure of a free drink!)?
- » Do you have a budget for food and drink?

### Speakers

- » Do you want to invite a guest speaker? If so, who?
- » Who is going to compere the event and introduce the speaker?
- » Has the speaker confirmed their attendance at the event?

There will no doubt be many other issues to consider too. Remember to work with colleagues in the CLP to make sure that everyone is agreed on the right way to proceed. You might not get everything right the first time, but use each event as a learning opportunity and afterwards take time to evaluate what went right and what you might want to change in future.

## 3. Audience-building

Making sure that some of the people that you invite come along to your event has to be your top priority. Don't expect everybody that you invite to attend – even getting 10% of them to come along should be considered a success, particularly if this is the first event of this kind that you are organising.

To begin with, make sure that you get your invitation out in plenty of time. How you send this will depend on the audience you are inviting, and how comprehensive your list of local contacts is. You might be able to invite full-time union officers directly, but if you are trying to reach a wider audience then you will probably need to ask your contacts within the unions to help distribute the invitation.

Speak to full-time officers of the union or unions whose members you are inviting to ask if they would co-brand the invitation. Union members might be more likely to attend if they can see that their union is backing the event, and not just the local Labour Party. The simple addition of a union logo might help boost turnout.

You might want to include an RSVP slip on the invitation, in order to give you an idea of how many people are likely to attend.

It is good to get initial invitations out early, but don't forget to send a reminder closer to the time. Ask your contacts in the unions to send

<p><b>All trade union members in the constituency</b></p>	<p>There will be hundreds of trade union members in a constituency, and it is important to think carefully about whether you wish to invite all of them to an event, or invite a more specialised audience. If you want to mobilise a large number of people, then inviting all the union members in the constituency might be effective – but remember that a large number of them will likely be disinterested in politics.</p> <p>Contacting this many people will require the support of each of the unions' full-time officers – they might be able to send an email or a write a letter to all of their members within the constituency boundaries. Bear in mind that this will take a fair bit of logistical planning, so start talking to your contacts in the unions early on in the planning stage to ask for their help.</p>
<p><b>All members of one large union branch</b></p>	<p>You might want to organise a series of more specialised events – for example, policy forums on specific areas that affect workers in particular fields. Inviting all the members of one large union branch might be an effective way of doing this.</p> <p>Through having conducted your audit and compiled your database (covered in Chapter 3) you should have an idea of what branches exist within the constituency, and how to contact the Officers of that Branch. Ask the Branch Secretary to circulate invitations to all members.</p>
<p><b>All shop stewards in the constituency</b></p>	<p>This would be an effective way of beginning to build relationships with union members in a number of branches and workplaces, without organising an all-members event.</p> <p>Hopefully your contact database will have provided you with the contact details of some of the shop stewards in the constituency, but be aware that this information is not always easily available – unions are often cagey about providing it, and there may be data protection issues in some cases. If you cannot contact shop stewards directly, then ask the unions' full-time officers to send out invitations on your behalf.</p>
<p><b>Shop stewards from one large workplace</b></p>	<p>There might be a large number of shop stewards in one constituency, so you might want to limit the number at any one event by only asking shop stewards from one large workplace. Contact them directly if you have their details, or through full-time officers.</p>
<p><b>All full-time officers with responsibility for the area</b></p>	<p>You should have compiled contact details for full-time officers covering the area as part of the process of creating a union contact database (covered in Chapter 3). If you are missing contact details, get in touch with the unions' regional offices.</p>

a reminder email on your behalf a week or so before the event. It might also be possible to get help to do a ring-round of people you have invited, dependent on the size of the invitation list.

Above all, remember to ask for help and support from officers in the unions with whom you have built a good relationship. In addition to helping spread the word about the event, they may also be able to help you word the invitation in a way that their members are likely to respond to.

Remember:

- design a catchy invitation, and see if the unions will allow you to add their logo;
- make the invitation relevant to the people you are inviting;
- give them a reason to come – if you are offering a free drink or are expecting a high profile speaker then tell them;
- send the invitation out in good time – at least 4 weeks in advance if possible;
- ask the local union officers to send a reminder email nearer the time; and
- even a small number of new people coming along to a Labour event is a success – view it as the first step on the way to re-engaging union members.

This model invitation (see right page) might help you when you design yours.

#### 4. Planning the itinerary

After you have sent your invitations, but well before the event itself, you need to start thinking about how the event is going to run on the night. Social events where most people already know each other don't need much of an itinerary, but if you are organising an event for people who don't know each other then you will need to plan an outline

for how the event will progress – people are unlikely to talk to each other if there is not a structure to the event.

Naturally, the itinerary will depend on the kind of event that you are organising. On page 22 are two examples of event itineraries – one for a social and one for a Policy Forum. You might want to use them as a basis for your event, but make sure that you tailor them to suit your local circumstances.

If you are organising a Policy Forum, be sure to speak to your Labour Party's regional office well in advance – they will be able to offer further support in running the event, and may be able to help you get a member of the National Policy Forum to act as a facilitator. You will also need to think carefully about what area of policy you want to cover in the Forum, and who the appropriate audience to invite would be. For example, if you are running a Policy Forum on manufacturing then it might be a good idea to invite members of a union with a large manufacturing membership; if the Policy Forum is about the NHS, then perhaps a union with public sector membership would be better.



Anytown Labour Party and  
Anyregion UCATT  
invite you to...

a reception for

## Anytown UCATT members

Come and enjoy a drink and snacks, get to know your MP, and take the chance to let us know the issues that are affecting you...

Thursday March 11<sup>th</sup>, 8pm

Anywhere Community Hall, Anystreet



*Let us know if you're coming...*

Name .....

Email .....

Address .....

Mobile number .....

*I am / am not able to attend the Anytown Labour Party  
and UCATT reception on March 11<sup>th</sup>*

Trade  
Union and  
Labour Party Liaison  
Organisation

**ANYTOWN CLP RECEPTION FOR TRADE UNION MEMBERS: ITINERARY**

7pm	CLP Officers arrive to set up the room.
8pm	Guests scheduled to arrive – CLP Chair and TULO Officer on the door to meet and greet. At the same time, other CLP volunteers serve drinks and circulate with guests.
8.30pm	CLP Chair briefly welcomes guests and tells them that food and drink is available, and there will be a couple of short speeches later. CLP volunteers continue to circulate making guests feel welcome. MP is introduced to guests and union officers.
9pm	CLP Chair introduces the speakers: the MP, leader of the Labour Group in the local council, and other appropriate people, who make short speeches (5-10 minutes each at the most) on how important it is that union members are involved in the Party, how they can get more involved and what the government has delivered for trade unionists.
9.20pm	The CLP Chair thanks the speakers and encourages guests to continue enjoying the food and drink. She tells them that the MP will be around until 10pm, so feel free to raise issues of concern. CLP volunteers continue to circulate, keeping Labour Party membership forms at hand!
10pm	MP leaves. Party volunteers and guests continue to socialise.

**ANYTOWN CLP POLICY FORUM FOR TRADE UNION MEMBERS: ITINERARY**

7pm	CLP Officers arrive to set up the room.
7.30pm	Guests scheduled to arrive – CLP Chair and TULO Officer on the door to meet and greet. At the same time, other CLP volunteers circulate with guests and collect contact details.
8pm	The facilitator for the evening welcomes the guests and explains how the evening will proceed. He or she allocates people into small groups, matches them with a facilitator for each group, and sets them the task of working through the policy questions.
8.15pm	Working in small groups, the guests work through the questions they have been allocated. The facilitator of the main group should supervise the group facilitators to ensure that the discussions are kept moving.
9pm	After the group discussions are concluded, the event facilitator chairs a session in which each group reports back on their discussions. A record is kept of consensus views, and of significant minority views.
9.30pm	The event facilitator summarises the record of discussions to ensure everyone is happy that it is accurate. The event then closes.

It is important that participants in a Policy Forum know what the fruits of their discussion have been – the facilitator should ensure that records of the discussion and any feedback from the Policy Commission are circulated.

**5. A welcoming event**

If your event is to be effective, it is crucial that your guests are made to feel welcome and valued. Going to an event on your own can be daunting, so taking a few simple steps to create a welcoming environment could make the difference between trade union members getting involved in the Party, or never coming back!

Remember:

- make sure that there are sufficient members of the CLP attending to circulate with the trade union guests, but not so many that the trade unionists feel outnumbered;
- brief your CLP volunteers in advance, so that they know what they are supposed to be doing;
- have one or two people on the door to welcome guests as they arrive and show them where to get refreshments;
- ask some of your CLP volunteers to take responsibility for circulating with guests and ensuring that everyone has someone to talk to;
- ensure that you collect contact details on the night – especially if people have been invited through union full-time officers – so that you can contact them directly in future; and
- ensure that CLP volunteers have Party membership forms to hand.

**6. Building relationships**

It is important that you see your event as the first step in building a relationship with local trade unionists, and that you follow-up after the event to ensure that the relationship can keep being strengthened. Make sure that contact details of participants in events are added to your local contacts database, and that you keep a record of who has attended which event.

You might want to consider some of the following ways of building relationships with people who have attended one of your events:

- write and thank all attendees for coming along – you could also include a Labour Party membership form;
- organise another different kind of event in a few months time and invite people who have attended previous events (don't leave it too long, but don't bombard people with invitations either – another event in six months or so might be good timing); and
- remember that the relationship with local trade unionists needs to be a two-way one – do talk to your contacts about getting involved in campaigning for Labour candidates, but don't forget to ensure people feel their concerns and interests are being represented within the local Party.

The most important thing is to maintain regular contact, and not to wait until just before an election to get in touch – don't underestimate the positive impact of year-round communication, and the negative impact of being seen to only engage at election time!

**An effective way of building the link between the local Party and the unions is to create opportunities for dialogue between elected Labour representatives and local union members. Whether it's Members of Parliament, Members of the Scottish Parliament, European Parliament, Welsh Assembly or London Assembly or local Councillors, both union members and elected representatives alike have a lot to gain from sharing ideas and opinions.**

This chapter will set out a variety of different ways in which you can encourage dialogue between local union members and their elected representatives. Spending time listening to the concerns of working people can only be a good thing for elected representatives, and creating an atmosphere whereby union members trust that their views will be listened to can also only be positive.

Naturally, building relationships between elected representatives and union members will likely pay dividends at election time. However, it is crucial to remember that the development of these relationships cannot be fast-tracked in the couple of months before an election. If anything, a flurry of activity immediately before an election will increase cynicism about politicians and give credence to the criticism that 'we only see you at election time'.

This Chapter should provide some inspiration for how to go about building meaningful, long-term relationships between union members and the elected Labour politicians who represent them, that will be of benefit to all concerned.

It will provide ideas on co-ordinating some of the following events and activities:

- 1. A Q and A with an elected representative**
- 2. A visit to a unionised workplace**
- 3. A visit to a union branch**
- 4. A Labour Forum**

Bear in mind that for all these activities you will need to have a comprehensive database of local union contacts – make sure that you have worked through the activities in Chapter 3 before starting to organise events.

Think hard about your local circumstances before developing a strategy for working with elected representatives. Whilst it is healthy for all Labour politicians to have strong links with local unions, if you live in a particularly marginal constituency you might want to focus more on developing a relationship between your MP and local union members; if you have a Labour Council but not a Labour MP then you might want to work more on the Council Leader or local Councillors' relationships. Talk to all your elected representatives about their needs and work with other Officers of the CLP to make decisions about how best to proceed.

### 1. A Q and A with an elected representative

A question and answer event with an elected representative is a good way of giving local union members a chance to have their views heard by Labour politicians. Logistically, it is a matter of following the guidance in Chapter 4 on organising events. You will also, of course, have to decide who it is that you are going to ask to be on the panel for the event. You could invite any combination of your Labour elected representatives, and it is also worth speaking to the Labour Party regional office, as they may be able to help you get a high profile speaker such as a Minister. Remember that the higher-profile the names on your panel, the more likely union members are to attend the event. For that reason, you should aim to know who the speakers are going to be before you send the invitations.

Putting together the itinerary for the event should be fairly simple – the basic structure should be a short speech from each member of the panel, and then plenty of time for people to ask questions. The event might flow

better if you decide on an issue to theme the event on – and ask each of the speakers to give their take on that issue. Make sure you tell the speakers in advance how long you would like them to speak for. Don't allow too long for speeches, as the audience will not want to feel they are being 'talked at'. However, if you have a guest speaker from outside the constituency, such as a Minister, then you might want to ask them to speak first and for a little longer.

Ensure that you have enough time put aside for people to ask questions – your audience need to go away feeling that they had the chance to have their views aired. Having an effective Chair of the meeting will also be important in making sure that everyone has the chance to have their say, and that the debate moves forward.

### 2. A visit to a unionised workplace

Visits to unionised workplaces can be an excellent way of getting to meet local union members on the ground, and learn more about the issues affecting them. Where possible, put a rolling programme of workplace visits in the diary, and plan well in advance – the more regularly the MP is out and about meeting union members in workplaces, the more people with whom he or she will be able to develop meaningful relationships.

The first thing to do when organising a visit is to select a suitable workplace – talking to branch or full-time union officials will help in identifying an appropriate place. Make sure that when you are co-ordinating the visit you do as much research as possible about the workplace, so that you can properly brief the MP. Are there any burning political issues in the workplace? Has the workplace benefited from any Labour Government legislation?

When possible, it is best to get the shop

stewards in the workplace to formally invite the MP to visit, and to co-ordinate this with the employer in advance. Where this is not possible, whoever is organising the visit could contact the employer directly to check their willingness, and then co-ordinate diaries.

As with all such things, there is no set formula for a successful workplace visit, but a tour with scheduled stops to meet staff, managers and shop stewards might be an effective method. You might also want to think about distributing a survey to staff and shop stewards in advance, to find out if there are any particular issues they wish the MP to take up on their behalf – you could then collect the responses on the day. Make sure there is a space on the survey for people to give their contact details. This itinerary might be helpful in planning the event.

Where possible, include an opportunity to talk to the local media – this will help to raise the MP's profile, but will also mean the employer gets something out of the visit too. You might want to think about setting up a photocall at the end of the visit.

#### MP'S VISIT TO ANYTOWN FACTORY: ITINERARY

10am	Anytown West MP arrives at Anytown Factory to meet factory manager and union full-time officer – have a cup of tea in manager's office.
10.15am	Begin tour of factory, meeting staff and being shown processes on the way.
10.45am	Meet factory's shop stewards for private discussion.
11.15am	Local press arrive for photocall with MP, shop stewards and manager.
11.30am	Visit ends.

Use the opportunity to collect as many contact details as possible, from union members and, in particular, from shop stewards. The pre-visit survey mentioned above might be a good means of doing this. This will enable you to add union members to your mailing lists – you might also want to invite them to some of the local Party's events too.

### 3. A visit to a union branch

The motivation for getting an elected representative out into union branches is similar to that for encouraging them to visit workplaces.

There are pros and cons attached to visiting a union branch, as opposed to a workplace. On one hand, visiting a large branch might give access to workers from a number of workplaces – this might be an effective way of accessing people who work in places where a workplace visit is not feasible. On the other hand, the people who attend branch meetings will be the more active trade unionists – this reduces the number of people the elected representative gets to meet, although it will mean they are meeting a core of people who are more active and involved.

Before beginning to organise a visit, it is important to think carefully about which whether it would be more effective to visit a workplace or a branch, and which branches have sufficiently good turnout to make a visit worthwhile – remember that your elected representatives' time is valuable, so spending an evening speaking to 3 or 4 people is probably not the best use of that time. Speak to your local contacts in the unions in order to ascertain this information, and use your judgement.

Logistically, organising a visit to a union branch is simpler than organising a workplace visit – it is simply a case of finding out when the next branch meetings are scheduled, and finding

a date that is mutually convenient with the elected representative and the branch's officers.

As with all such events, make sure that the elected representative is properly briefed in advance, and that they understand the issues that are likely to arise. Also ensure you collect contact details for the people who attend, so you can keep in touch in future.

### 4. A Labour Forum

It is a good idea to try and arrange regular opportunities for your elected representatives to meet with senior full-time and lay union officers in your constituency. One way of doing this is organising regular Labour Forums.

Who you choose to invite to your Labour Forum is up to you – but it might be a good idea to start with the Labour-supporting full-time officers of all the affiliated unions. Your other work in building local relationships should have highlighted any particularly active Labour-supporting lay officers too, so you may well want to invite them as well.

The purpose of a Labour Forum is to increase dialogue between elected representatives and union officers, so if you are going to organise regular meetings of this type it is crucial to get your elected representatives on board with the idea.

Once you have the agreement in principle of your elected representatives (particularly MPs, MSPs, MEPs, AMs and GLA members), you need to decide when, where and how often you are going to meet. Speak to your elected representatives about when would be convenient – a Thursday evening might be a good time, when the MP is back in the constituency from Westminster. As with all events, you will need to find a centrally located, accessible venue. When it comes to deciding how often to meet, speak to

your elected representatives about how often they are prepared to commit to attend. There is no point organising frequent meetings if the elected representatives are not going to make it along. Aiming for one meeting every three months to begin with may be a good start, but you can always make them more or less frequent later on dependent on attendance.

Your other work, and having completed the database of local union contacts, should mean that you have good means of communication with the relevant union officers. For the first meeting, write a formal letter of invitation, explaining that you are hoping to strengthen dialogue between the unions, the CLP and the elected Labour representatives. It is also a good idea to get your MP, or other elected representative, to co-sign the invitation, to make it clear from the outset that they are committed to using the Labour Forum as a way of building partnerships with the unions. Make sure you follow up the letter with a phone call, to ensure you get as many people attending as possible.

The agenda for these meetings should be simple – the topics for discussion are likely to define themselves. You might want to start with short presentations from the elected representatives, and then move on to an informal Q&A session. Be flexible and be prepared for your agenda to evolve over time. For example, after the Labour Forum has met a few times, it might be a good idea to invite the CLP's Campaigns Officer to come and speak to the Forum in order to engage the unions in the CLP's campaigning activity

Trade  
Union and  
Labour Party Liaison  
Organisation

This chapter describes some of the additional ways that you can go about strengthening the links between your CLP and the affiliated unions. It focuses, primarily, on recruiting trade union members to the Labour Party.

Campaigns to recruit people to the Labour Party work best when you have a target list of people who are likely to be supportive of the Party – that is why many CLPs will run recruitment campaigns amongst people who are regularly identified as Labour voters. Trade union members are another group of people who can be targeted as part of a Labour Party recruitment campaign. This chapter sets out some different tactics you might want to use when working to recruit local trade unionists to the Party. This will not be an easy task, and you shouldn't expect everyone you speak to to want to sign up.

You will need to think carefully about the kind of arguments you want to use when you speak to local union members. It is important to emphasise the successes of this Labour government in delivering for working people; however, you will no doubt also want to make clear to people that they can make their voices heard within the Party as a member whether or not they agree with various government policies. Think about whether there are any local issues to bear in mind, too – if the local community has been particularly affected by any government policies.

Recruiting additional trade union activists into the Party is an effective way of building the link between the Party and the unions. It serves to increase the number of activists within the Party itself, whilst also enabling union activists to input their ideas within the Party's democratic structures. It may also help you identify potential delegates from union branches to the GC.

## Recruiting trade unionists to the Party

This section sets out some of the different ways that you can set out to recruit trade unionists to the Party. Talk to your colleagues in the CLP and contacts in the unions when deciding the best way to proceed.

### 1. Membership forms

This may sound like an obvious point, but always try to have Labour Party membership forms to hand. If you are hosting an event for trade unionists, or if an elected representative is visiting a workplace, be sure to have membership forms readily available. Always take the opportunity to talk to people about the importance of making their voices heard within the Party. TULO also produces Labour Party membership forms specifically designed for union members, which you can order from [www.unionstogether.org.uk](http://www.unionstogether.org.uk).

### 2. Run a phone bank

One effective way of working to recruit trade unionists to the Party is to operate a phone bank to call union members. You will need to speak to a union's full-time officer to ask for access to a membership list with telephone numbers – you could also ask to use the union's offices for the phone bank itself. It is likely that many union officers will be reluctant to give you access to their membership data – as a compromise you could ask to use the union's office, and return the contact lists at the end of the evening. You might want to use the script on the following page as a basis for your calling on the night – but it will likely be far more effective if you tailor it to local circumstances and address union-specific issues.

### 3. Write to union members

It may prove impossible for you to get access to contact details for union members. In that case, you could think about working with individual unions to write to all the members

in the constituency. It should be relatively easy for a union to do this through their membership systems, so it is really a case of getting the union to agree to do the mailing, and agreeing the text of the letter itself. You could do a joint letter from the CLP and a regional union official, or you could send one just from the union – ultimately, however, the mailing will be coming from the union, so they will have final say over the content. The draft letter on the next page might be a good starting point.

### 4. Workplace recruitment campaign

You could also work with full-time union officers to run a recruitment campaign in workplaces. This is particularly likely to be effective if you already have a Labour activist who is active in the union in the workplace, but you can still run a workplace campaign with the support of full-time union officials. You could ask union officers or shop stewards to distribute letters to members and membership forms in the workplace, or ask them to display materials on the union noticeboard.

### 5. Effective follow-up

As with all aspects of building relationships, following up is particularly important. If you recruit someone to the Party, it is important that they receive more information quickly – also, the more time you can invest in helping them get involved, the more likely they are to become an active member. These points, though fairly self-explanatory, are important to bear in mind in order to follow-up effectively:

- If someone returns a completed form to you, send it on to the Party immediately. It is also a good idea to keep a copy of the form for reference, and in case it gets lost in the post.

- If someone asks you to send them a membership form, be sure to put it in the post immediately – it is also worth giving them a friendly call a week or so later to remind them to send it back.

- Keep track of those who join as a result of your TULO recruitment campaign. If possible, ask those who join because of your efforts to send forms back to you, in order that you can keep records before you send them on to the Party.

- Keep in contact with your CLP Secretary – cross reference the list of new members they receive from the Party with the list you have kept, in order to find out when the membership applications of people you have recruited have been processed. You can then write to them in your capacity as TULO Officer to let them know how to get involved. Use the letter later in this chapter as a basis for your letter. You can also write to other people who join the Party and who are union members.

- Make an effort to get to know union members who have joined as a result of your efforts – they are in an ideal position to get involved in the activities you will be co-ordinating as TULO Officer, and might also be good delegates from their union branch to the CLP if it affiliates.



## Join the Labour Party Script

Script for recruiting trade unionist to the Labour Party

- » **Hello, can I speak to (name) please?**
- » Hello **(name)**, my name is **(name)**, and I'm calling from your local Labour Party and **(name of trade union)**.
- » I understand that you are a Labour Party supporter, and a member of (name of trade union) – is that correct? (if yes – continue, otherwise – close call)
- » **That's great, thank you very much.**
- » The Labour Party and the trade unions go back a long way and share many things in common. This Labour government has worked closely with trade unions to improve working rights and conditions.  
  
But if the Labour government is to continue to represent people like you, then we need people like you in the Labour Party – people who understand the issues that affect working people in their day to day lives.
- » The Labour Party offers a special rate of membership for trade unionists, of just £1 a month – for that, you get the chance to have a say in Labour Party policies and vote for candidates in Labour Party elections. Joining the Party means you can make your voice heard.
- » Not only that, but your £1 a month goes towards making sure that the Tories don't get in again, which is something we all want to make sure of.
- » So, will you join the Labour Party for just £1 a month? (if yes – go straight to the 'will join' box, if no – continue)
- » Would you be interested in some more information about the Labour Party? (if yes – take their details and send them the information, if no – close call)

### Will join

- » That's fantastic, thank you!
- » I will send you a form – all you need to do is fill it in and return it to the freepost address. (make sure you take their name, address, email and telephone number)

### Call close

- » Thank you for your time (and for your continued support / for joining Labour).



Ms T Unionist  
56 Any Road  
Anytown AN5 5TV

Freda Bloggs  
Trade Union Liaison Officer  
Anytown CLP  
16 Somewhere Road  
Anytown AN1 1AA

Tel: 01134 123 456  
Email: TULO@anytownlabour.org

Dear Ms T Unionist

I am writing to you in my role as Trade Union Liaison Officer for Anytown Labour Party, as you are a member of Any Union.

The Labour Party and the trade unions go back a long way and share many things in common. This Labour government has worked closely with trade unions to improve working rights and conditions. As you may well know, your union affiliates to the Labour Party nationally. But if the Labour government is to continue to represent people like you, then we need people like you in the Labour Party – people who understand the issues that affect working people in their day to day lives.

It is crucial that trade unionists are involved in the Party at every level – it is by trade union members making their voices heard through the Labour Party's democratic and policy-making structures that we can ensure that Labour continues to push forward policies that make a difference to the lives of working people.

The Labour Party offers a special rate of membership for trade unionists, of just £1 a month – for that, you will get the chance to get involved in making all sorts of decisions – from selecting Labour's local candidates to submitting motions to Party Conference. I am sure you'll also agree that no-one wants a return to the days of Tory misrule, and your £1 a month also goes towards making sure that the Tories don't get in again.

I have enclosed a membership form with this letter – all you need do is fill it in and post it back to the freepost address.

If you want to discuss this any further, I do hope you'll get in touch – my telephone number and email address are at the top of this letter.

Yours sincerely

**Freda**

Freda Bloggs  
Anytown CLP Trade Union Liaison Officer





Ms T Unionist  
56 Any Road  
Anytown AN5 5TV

Freda Bloggs  
Trade Union Liaison Officer  
Anytown CLP  
16 Somewhere Road  
Anytown AN1 1AA

Tel: 01134 123 456  
Email: TULO@anytownlabour.org

Dear Ms T Unionist

I am writing to you to welcome you to the Anytown Constituency Labour Party (CLP). I am the Trade Union Liaison Officer for Anytown CLP, and I am aware that you are also a member of Any Union. I hope you will use me as your first port of call for any queries you have about the Labour Party – its activities and its structures. Some members of the Labour Party choose to just pay their subscriptions, but there are also lots of different ways to get involved.

Your local branch of the CLP is Park North, and they hold regular meetings to discuss local issues. Contact the Branch Secretary, Jim Penn, on 01134 456 456 for more details. The Constituency Party as a whole also meets regularly, on the last Tuesday of the month, and often has guest speakers and discussions on national issues. Contact Barbara Morgan, the CLP Secretary, on 01134 123 123 for more details.

You may be interested to know that there is a CLP fundraiser coming up on the 17<sup>th</sup> of next month – it's a quiz night, and tickets are just £2, and drinks are £1 each. It will be a good chance to meet other Labour Party members in the area. If you want to come along, do let me know and feel free to invite some friends and form your own team.

We are also starting our campaign for next year's local elections, and will be going canvassing every Saturday from 11am to 1pm, leaving from the CLP Secretary's house, 24 Long Lane. If you are interested in coming along then we'll show you what to do, and we usually go for a drink or something to eat after we've finished.

I do hope you'll get involved one way or another, and don't hesitate to give me a call if you have any questions at all.

Yours sincerely

**Freda**

Freda Bloggs  
Anytown CLP Trade Union Liaison Officer



### Recruiting Labour Party members to trade unions

In order to build the link, it is also a good idea to think about how you could work to recruit members of the local Party to a union, if they are not already. Speak to the CLP Secretary about how to move forward with this, but you could think about:

- looking at the CLP's membership records, and contacting anyone who does not have a union listed to ask them if they are members of a union and, if not, whether they would consider joining one;
- or writing to all council candidates when they are selected, to ask them if they are in a union and, if not, to ask them to consider joining one – bear in mind that many of the affiliated unions will consider making small donations to the local campaigns of their members in council elections;
- passing a motion in the CLP on the importance of the link, and of members of the Party being active in a trade union.

Trade  
Union and  
Labour Party Liaison  
Organisation

This chapter focuses on Constituency Development Plans (CDPs) – what they are, who they benefit and how to set them up.

### What is a CDP?

CDPs came about after recent changes in the law with regard to donations to political parties. They enable trade unions to invest in CLP development over the long-term. A CDP is an agreement between the General Secretary of an affiliated trade union, the Chair of a CLP, and the relevant Regional Director of the Labour Party, and also has to be ratified by the National Executive Committee of the Labour Party.

### The role of the TULO Officer

If a CLP has a CDP in place with a union, then the TULO Officer should take an active role in ensuring that the terms of the agreement are fulfilled by both the CLP and the union, and take responsibility for writing the 6-monthly activity reports. If there is no CDP in place, then a TULO Officer should work with other officers of the CLP to identify a union to approach in order to sign an agreement.

### What benefits does a CDP bring?

CDPs strengthen links between a CLP and a trade union, provide an action plan for developing a CLP, and union resources to back it up. The content of a CDP can vary – some are lengthier documents than others – but, generally speaking, they outline activities that the CLP has agreed to undertake, and the support that the union has agreed to provide in return.

Unions generally make the decision about how much money they will give to a CLP to finance a CDP – but it is generally up to £2000 a year. Ideally, a CDP will also include a commitment to supporting the CLP through

other means too – by providing the contact details of local officers and branches, for example. Many CDP agreements are signed for the lifetime of a Parliament, but some unions prefer to negotiate them on an annual basis.

A robust CDP agreement will also include targets and activities that the CLP pledges to undertake. These will vary according to local circumstances, but as a minimum will usually include:

- submitting an activity report to the union every 6 months;
- appointing a TULO Officer;
- holding regular Labour Forums;
- inviting a representative of the union to sit on the CLP's Executive Committee (EC);
- promoting trade union membership to Labour Party members; and
- working with the union to promote Labour Party membership to trade union members.

In addition, a CDP should ideally include other activities, that are negotiated between the CLP and the union to reflect the CLP's specific situation. These activities could include:

- conducting polling or opinion surveys amongst the electorate;
- recruiting and retaining members;
- organising local policy forums.
- producing and distributing literature informing and encouraging dialogue between the party and the community;
- funding organisers and field workers;
- organising activities aimed at increasing voter turnout, such as registration and postal vote campaigns; and
- organising political education and training events in line with the party's objectives.

### How to set up a CDP

It is important to state from the outset that setting up a new CDP from scratch can be a difficult process. It is only likely to be achieved if a CLP has a very strong relationship with a particular trade union.

There is no set procedure for setting up a CDP – each union manages its CDP agreements in different ways. However, the first step should be identifying a potential union to approach – this is likely to be the union that the CLP has the closest links with. Establishing which union it is most appropriate to approach will involve speaking to local CLP activists, and looking at the results of your union involvement audit. You will need to find out if your CLP has had a CDP with a particular union before. It is also worth thinking about whether one union has significantly more members living in the constituency than the other unions. You should also find out if your MP, MSP or AM is a member of a particular union's Parliamentary Group (although it is important to remember that the MP, MSP or AM can have no role in the CDP – this should just be background information).

When you have consulted with other CLP Officers to decide which union to approach, you should speak to the Labour Party's regional office, and a full-time officer of the union (with which you already have a relationship) for advice on how to proceed. At that point the best way forward will likely be to contact the relevant union's regional political contact. Some unions make decisions about CDPs at a national level, some at a regional level, and some at both. At this point, it is a question of finding the right person to speak to within the union to help you progress your request, and making a strong case for why both the CLP and the union would benefit from the agreement. This will not be an easy task, and it is important to be aware from the outset that the CDP may not come to fruition.

### What else to bear in mind

It is worth considering that a CLP can have CDP agreements with more than one union, but the convention is that the total amount the CLP receives from both unions should not be more than £2000. In addition, the General Secretary of the first union has to agree to a second union signing a CDP with a CLP, and some unions are unwilling to do this. However, if you have one CDP for an amount that is significantly less than £2000, it is worth thinking about the possibility of setting up a second CDP – although doing this may be even more difficult than setting up an initial one.

It is also important to remember that all donations received by a CLP in excess of £1000 have to be declared to the Electoral Commission – although it is generally worth declaring all donations, whatever their amount, for the sake of transparency.

This chapter looks in detail at the many ways that you can work with trade unions to campaign for Labour candidates in elections.

Many of the activities outlined here should be put into action well before an election – leaving it until the last minute will make it very difficult to gain resources or volunteers for the campaign. The importance of building up a strong relationship with trade unions over time cannot be underestimated – it is important to start building up for elections early – chapters 1 to 7 of this guide are designed to create partnerships between the Party and the unions over the long-term.

Whilst it is still important to work to engage trade unionists in campaigning for Labour at election time even if you have not been able to do the work needed to build long-term relationships with local trade unions, you are far less likely to see results. There is also the risk that only starting to engage with unions close to elections will increase cynicism about politics.

The main objective of the CLP TULO Officer in the months leading up to elections is to secure volunteers and resources from the affiliated trade unions, in order to complement the other campaigning work of the CLP.

If you are in a key seat or area, it is likely that the Regional TULO Committee will also appoint a TULO Co-ordinator to act as a bridge between the CLP and the unions in the region (see chapter 2 for more information about the roles of CLP TULO Officers and TULO Co-ordinators, and how they overlap). Both CLP TULO Officers and TULO Co-ordinators should sit on the CLP's campaign committee, in order to ensure that the work they are doing fits in to the Party's overall campaigning strategy.

There are many and varied activities that can be undertaken in order to engage trade union members in the campaign. This

chapter provides a list of possible options, but it is certainly not a finite one. Be creative, and talk ideas over with colleagues in the CLP and unions in order to develop a strategy that works for you.

- 1 **Contacts database**
- 2 **Involving union members in the campaign**
- 3 **Organising a regular TULO campaign night**
- 4 **Seeking donations to the campaign**
- 5 **Asking unions to donate resources**
- 6 **Campaigning in workplaces**
- 7 **Organising workplace visits**
- 8 **Donations**

## 1. Contacts database

If you are to be successful in involving trade unionists in the campaign, it is essential that you have a comprehensive database of local union contacts. If you have worked through the first chapters of this guide, then you should already have a database in place – in that case, it is simply a case of ensuring that details are up to date well in advance of an election.

If, however, you are coming to this handbook very close to an election, and have had sufficient time to work through the long-term activities, it is crucial that you follow through the instructions set out in chapter 3 in order to build a union contact database from scratch. If you do not have the means to contact trade unionists effectively, then you will find it near impossible to involve them in your campaign.

## 2. Involving union members in the campaign

One of the most effective things you can do in the run up to an election is to gain extra volunteers from the campaign from amongst trade union members. It is important

to have sensible expectations of what you can achieve – unions do not have armies of leafleters just waiting to be sent out campaigning – but even gaining a few extra regular campaigners can make a real difference in an election.

The earlier you start these activities the better. If you leave it until the last couple of weeks before an election, then you will no doubt struggle to get many people involved. It is a good idea to start a long time before an election, and then organise campaigning more frequently as it gets closer and you build up a relationship with your volunteers.

How you go about engaging union members in the CLP's campaigning will depend on your relationship with local unions, but these steps should help you put together a strategy:

- Produce a campaign diary flyer, targeted at trade unionists (you could use the sample on the next page as a basis). Ensure that you put on essential information, such as times and meeting points for campaigning, but be careful not to include politically sensitive information about the campaign strategy, as the information will be widely available. Advertise different kinds of events on the flyer – voter ID, leafleting, envelope stuffing – to appeal to as many people as possible.
- Ask your contacts in trade unions to assist you in circulating the flyer. You will probably want to send it round various networks in order to ensure as many people as possible see it. You will probably need to send an updated campaign diary every fortnight, or more frequently nearer the election.
- Ask full-time officers to email it to their contacts.
- Ask branch secretaries to email it to

members of their branch, and to hand out copies at their branch meetings.

- Ask shop stewards to ensure the flyer is available in their workplace, and to display a poster-sized version on the union noticeboard.
- Follow-up is essential – advertising campaigning by distributing a campaign diary is an important first step, but realistically you are unlikely to get people who have not campaigned before to come along on their own to a voter ID or leafleting session. Spend some time doing a ringround of everyone on your contact database to ask them to come along campaigning – try and get them to agree to a specific event and, if possible, let them know that you are going to be there.
- If you have enthusiastic volunteers from the unions, ask them to put together a campaign team together with two or three colleagues – people are much more likely to go campaigning if they know someone else who will be there.
- Make sure that you make campaigning fun – giving people a cup of tea when they come back to the campaign HQ, and going to the pub afterwards, can make a difference when it comes to asking people to come back and campaign again.
- Always ask your volunteers if they will be able to come again, and keep a record of who has attended in order to invite them again and thank them after the election.

# CALLING ALL TRADE UNIONISTS...!

**Protect the right to pension schemes for all,  
parental leave and paid bank holidays**

## JOIN THE CAMPAIGN!

<b>Sat 19<sup>th</sup> April</b>	<b>Street stall, outside Argos in Anytown Shopping centre, 11am-1pm</b>
<b>Sun 20<sup>th</sup></b>	<b>Mass leafleting and Voter ID, Meet at 31 Anystreet at 11am</b>
<b>Tues 22<sup>nd</sup></b>	<b>Telephone Voter ID 7pm-9pm at Anytown GMB officers, 68 Grange Road</b>
<b>Weds 23<sup>rd</sup></b>	<b>Trade Union Campaign Night and Social 7pm-9pm, meet at 31 Anystreet, social at the Dog and Duck from 9pm</b>
<b>Sat 26<sup>th</sup></b>	<b>Street stall, outside Argos in Anytown Shopping centre, 11am-1pm</b>
<b>Sun 27<sup>th</sup></b>	<b>Mass leafleting and Voter ID, Meet at 31 Anystreet at 11am</b>
<b>Tues 29<sup>th</sup></b>	<b>Telephone Voter ID 7pm-9pm at Anytown GMB officers, 68 Grange Road</b>
<b>Weds 30<sup>th</sup></b>	<b>Special Trade Union Event! Eve of poll leafleting, anytime from 6pm at 31 Anystreet</b>
<b>Thurs 1<sup>st</sup> May</b>	<b>POLLING DAY Help needed all day, from 7am to 10pm!</b>

**Full training will be given for all activities, but none of them are difficult and all of them are fun – why not get involved? The alternative to Labour is a return to the Tories – services cut, schools and hospitals crumbling, 3 million unemployed and 1400 home repossessions a week!**

For more information, call the campaign hotline on

**01134 123 456**

Don't forget to include an imprint!



### 3. Organising a regular TULO campaign night

In addition to working to involve union members in the regular campaigning activities of the CLP, it is also a good idea to co-ordinate specific campaigning events targeted at trade union members. How often you do this will depend on local circumstances, but it might be good to organise a monthly event to begin with, becoming weekly in the months directly before the election.

It is a good idea to combine a regular campaigning session with a social event – 2 hours leafleting or stuffing envelopes followed by a social in a pub will not only appeal to more people, but will also enable you to build stronger relationships with volunteers in order to entice them back in future.

Use the steps outlined in the section above when planning how to advertise your campaigning events. In particular, make sure you spend some time calling people who have campaigned before to ask them to come to the next event – if you can get a core of volunteers who attend regularly, then you will be able to have a real impact on the campaign.

### 4. Seeking donations to the campaign

The second key part of a CLP TULO Officer's role in the months leading up to an election is seeking the donation of money or resources from unions to the campaign. As with gaining volunteers, this will be much easier if the CLP has already built solid relationships with local unions – however, it is still important to ask for donations even if those relationships have not been built, as some resources may still be forthcoming.

Follow these steps when seeking donations from union regions or branches:

- Speak to union full-time officers or branch officers with whom you have a relationship, to ask about the likelihood of getting a donation, and how to proceed in formally requesting it.
- Write to each union branch and region, thinking carefully about how to approach each letter individually. For example, if you are writing to a union branch that your MP has visited, it might be better for the letter to come from them.
- Be realistic about how much money you ask for – most union branches do not have large cash reserves – a donation of £100 from a branch would be a considerable success. Unions' regional offices are likely to have more money, but will probably want to focus it on the areas that the Labour Party region has designated priorities, or on candidates with whom they have a particular relationship.
- Make a strong case for how the money will be spent – provide evidence of a need for the cash, and an idea of how much you need. For example, ask for £100 to fund the printing of a leaflet in a marginal ward.
- Follow up all letters with a telephone call, to ask if the money has been approved. If it is approved, you may also need to make another phone call to ensure the cheque arrives at the time you need it.
- Write to thank all union branches or regions who donate to the campaign – the letter could come from the CLP TULO Officer or the candidate, whoever is most appropriate.
- Ask council candidates to get in touch with their unions to ask for a small donation to the campaign – many unions have some funds available to donate to their members standing for council, and the money soon adds up if donated across a council area.

It is also a good idea to get in touch with your Regional TULO Committee to ask for a donation to the campaign (you can find the contact details in the TULO Directory), although most will only focus resources on more marginal areas. However, the maxim 'if you don't ask, you don't get' is particularly applicable here!

### 5. Asking unions to donate resources

Unions can donate resources other than money, and seeking access to alternative union resources is an important part of the CLP TULO Officer's role. There are many other ways that a union can contribute, some of which are outlined here.

It is important to work with the CLP campaign co-ordinator to find out what sort of help would be the most useful to the campaign. Whilst volunteers are always welcome, other kinds of assistance will need to be discussed with the election agent to see if they are appropriate to the campaign and if they can fit inside the election expenses.

As with financial donations, unions are likely to want to focus their resources on the most marginal areas, but they may be more likely to offer you access to certain resources rather than money.

How you go about asking for some of these resources will depend on your relationships with local full-time officers. In terms of more straightforward asks, such as franking a mailing, then writing to a full-time officer and following it up with a phone call might be the best approach. For more complicated requests, such as asking for an officer to be seconded to the campaign, it is probably best to ask only if you have built up a strong relationship with a particular union or officer.

These suggestions may help you when thinking about what support to ask for:

- Ask a union to frank a mailing for the CLP – for example, a direct mail to voters, or a letter to party members asking them to help in the campaign.
- Ask a union to write to its members in a constituency to ask them to vote Labour.
- Ask a union if the CLP can use some of its office space for telephone voter ID in the evenings, or calling on polling day. Some unions have even donated some office space full-time to be used as campaign headquarters.
- If you have a particularly good relationship with a full-time officer of a union, you might want to consider asking for them to be seconded to the campaign in the last few weeks before the election.
- Secondments will, however, have to be included in election expenses, so it might be that full-time officers take annual leave for the final days or weeks of an election campaign to enable them to devote time to the campaign.
- If you are able to secure a union officer full-time for the campaign, think carefully about what would be an appropriate role for them to play.
- A union may be apply to provide two or three volunteer drivers with cars on polling day, or on an ad hoc basis (for example, if a Minister visits the constituency).

### 6. Campaigning in workplaces

It is a good idea to work with union officers to distribute campaign materials in local workplaces – whether it's posters or postal vote forms, workplaces are a good way of accessing potential Labour voters.

### Posters and leaflets

Many unions will produce their own posters giving reasons for voting Labour, and full-time officers may well distribute these to shop stewards. If that is not the case, post standard or localised Vote Labour posters to full-time officers or shop stewards who you think are likely to display them in workplaces.

Similarly, ensure that copies of relevant local campaign materials are distributed to union officers and shop stewards who are likely to display them.

### Voter registration and postal votes

If you are beginning your campaigning sufficiently before an election, it is a good idea to consider running a voter registration campaign in local workplaces. At certain times in the electoral cycle, national unions might have specific voter registration campaign materials available. If they are not available, registration forms can be obtained from your local Electoral Registration Officer, or downloaded from the Electoral Commission's website.

Similarly, it is a very good idea to run a postal vote campaign in local workplaces. You should be able to get model forms from your regional Labour Party Office.

If you are running either a postal vote campaign or an electoral registration campaign, you will need to think carefully about the logistics, and ensuring that shop stewards and full-time officers are properly briefed. In particular, you will need to consider how you are going to process the forms. Remember that people who work in one constituency will not necessarily live there – therefore, forms might well need to be returned to the Electoral Registration Officers in several different local authorities.

Bearing that in mind, it is a good idea to ask for all forms to be sent to one

central address (the Labour Party office or campaign centre). Whoever is collating them would then need to find out the address of the ERO in the relevant local authority (this can be done by inputting postcodes at [www.aboutmyvote.co.uk](http://www.aboutmyvote.co.uk)), and then send the form on. This needs to be thought through in advance, as it is crucial that voter registration or postal vote forms are sent on straight away when they are sent to the CLP. In the run-up to some elections, the Labour Party operates a national freepost address to collate and send on postal vote application forms – if this is happening it is worth utilising the national set-up, rather than trying to replicate it at a local level.

### 7. Organising workplace visits

In the run-up to elections, visits to workplaces by candidates are excellent ways of engaging with working people whilst increasing the profile of the Labour campaign. As with all activities, the further in advance of an election that you can begin a programme of workplace visits, the more effective they will be.

Use chapter 5 of this handbook to plan workplace visits – but be sure to co-ordinate with the organiser or campaign manager in order to select the times and venues that are most appropriate to the campaign as a whole.

### 8. Legal requirements

Whether you are seeking financial donations or donations in kind from trade unions, it is essential that you work closely with the election agent to ensure that donations fit within limits, and are fully reported. This is a legal requirement, so ensure you keep accurate and comprehensive records at all times. Also ensure that you include an appropriate imprint on all materials that you produce. If in doubt, speak to the election agent or to the Labour Party's regional office.

# Trade Union and Labour Party Liaison Organisation

Trade  
Union and  
Labour Party Liaison  
Organisation

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**Regional TULO Officer**

020 7783 1166

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