

# Advocacy Kit

## Introduction and Background

This kit is designed to assist academic library staff in launching effective advocacy campaigns.

It is intended to be used when lobbying both internally (within your own college or university) or externally (with government, other organizations or the public). Advocacy normally has two thrusts, one of education and one of lobbying on an issue or principle.

Please use this kit to develop your lobbying or advocacy campaigns. In your use of this kit please attribute OCUA as the provider of the kit. This kit is the description of the process.

## The Plan

To launch an effective lobbying campaign you must have an action plan with clearly stated goals and objectives, know exactly what your aim is within the organizations, know the people you are lobbying, and have a mechanism for measuring success.

Every situation is unique; whether the lobbying group is at an individual College or University, or is working provincially, it will develop its own plan based on its own distinctive situation.

This lobbying plan has six major steps:

STEP ONE: ASSESS YOUR SITUATION

STEP TWO: SET YOUR GOAL

STEP THREE: DEVELOP YOUR CORE MESSAGE

STEP FOUR: DEVELOP YOUR PLAN

STEP FIVE: ACT ON YOUR PLAN

STEP SIX: ASK IF IT IS WORKING

## Step One: Assess Your Situation

Begin by assessing 'where you are now.' This is not always an easy task. Start by clarifying and determining where your lobbying group stands on the issue or principle. The questions you need to ask may be difficult to answer, but it is important to prepare a thorough but realistic assessment of the situation.

When assessing "where you are now," questions you can ask include:

- Which are your target groups or organizations? Who are potential allies or foes?
- Whose opinion may be swayed and by whom?
- Where does each group or organization stand on your issue?
- If they agree, how can you convince them to support your campaign?
- If they don't agree what is the most effective way to convince them of the merits of your argument?
- What will they say in response to your message?
- How can you effectively counter their arguments?
- If targeting a group does it speak with one voice?

## Implications for Your Plan

If your group already has an excellent relationship with the administration or organization that you are lobbying the campaign should then focus on building the relationship.

Where such a relationship does not exist, your group would have to develop methods for communicating more effectively with the administration or the organization as part of any lobbying campaign.

If the Administration has already decided that it wishes to act in a manner contrary to your groups' position, any lobbying campaign needs to take a pro-active stance to demonstrate the negative effect of the Administration's decision and to promote the value of your position.

## Step Two: Set Your goal

A clear, concise, well-defined measurable goal is the cornerstone of any lobbying campaign and yours is no exception.

The goal answers the question:

"What do we hope to achieve by lobbying?" It maps out your destination, and by doing so, allows you to focus your efforts.

The goal should be written in simple, easy-to-understand language.

The goal of OCULA's lobbying campaign is to: "Convince Ontario Government Publications Office that access to government information should be easily available to all citizens of the Province of Ontario."

At the local level, your goals may vary in emphasis, depending on the target group you are trying to reach.

Your goal with Institutional Administration could be to:

"Persuade a majority of the College/University Administration that they should put resources in place to make these valuable materials available."

Your goal in the community could be to:

"Convince a modest group of faculty and students to write a letter to the government expressing their support for the public's right to equitable access to government information."

## Implications for your plan

Although the underlying goal in both cases is the same (protection of the citizens' right to equitable access to provincial government information), how you express it and how you follow it up will be different for each target audience. Obviously, a goal of 500 letters for a community of 1,000 would be out of the question.

## Step Three: Develop a Core Message

Define the core message of your lobbying campaign: When planning a lobbying campaign it is important to define the 'core message' that will form the foundation of your campaign.

The goal answers WHAT you hope to accomplish.

The core message explains WHY:

It is a **SYNOPSIS** of your lobbying message.  
It provides a clear **FOCUS** for your campaign.  
The core message should be concise, with no more than three major points.

- Access to government information is a right.
- Academic libraries are founded on the principle of access to information for the purposes of education, study and research.
- Distribution of government information is essential at the time of production.

## **Implications for your plan**

During your campaign you may elaborate in depth on each point in your message, but in essence, your core message - the major points you wish to communicate - will remain constant.

Your arguments should relate back to points made in your core message.

## **Step Four: Develop Your Plan**

You are now at the point where it is necessary to put the details of your plan on paper. Here are questions to guide your thinking:

- Who are your target groups?
- What do you hope to achieve with each group?
- How do you intend to reach each group (in person, telephone, mail, email?)
- Who should make each contact (a librarian, faculty member, or other?)
- What resources are needed (information, human resources, financial resources?)
- What steps must be taken to obtain these resources?
- What tools do you need to create to help carry out your plan?
- What are the time-lines or deadlines?
- How will you monitor and measure results?

## **Implications for Your Plan**

If you have done your homework, you should know what arguments 'the other side' will pose. You should also have thought out how you would respond to criticisms.

It is crucial that you treat any critics with respect. Don't get personal.

Remember that you are commenting on the ideas a person presents -- not on the individual person who is presenting those ideas. Every point of view has some merit.

It is important to listen, calmly, and then to give your response in a clear level-headed manner. Practise the answers to difficult questions beforehand.

## **Step Five: Act On Your Plan**

### **Know What You Want to Say**

However you are communicating, state your core message. Anticipate questions that will be asked and know what your answer will be. If you plan properly, there should be little that happens that takes you by surprise whether it is in a meeting, in telephone conversation or in a casual encounter.

## **Locate and Support Your Supporters**

Let your supporters help get your message across. Ideally your most powerful spokespersons are library users. Find out who is willing to write letters, contact administration, make phone calls or speak out on your behalf. Make sure supporters are fully aware of your goal and that you give them the resources, information and support they need to do their job properly.

## **Go Out and Meet People**

Remember: there is no communication technique more effective than meeting people directly. Phone calls, letters, discussion papers, and public meetings are all useful lobbying techniques, but they should always be supplemented with face-to-face meetings. When planning such meetings, always ask for an appointment. Never arrive unexpectedly. Be prepared and know what you are going to say. Once the meeting begins, don't beat around the bush. Let your host(s) know why you are there. Time will be limited. Know how you will present your case in the time allotted.

## **Remember: Talk. Don't Lecture.**

Engage in a conversation. Prepare background documentation to support your argument and bring it with you. You may refer to it from time to time, but don't read from it verbatim during the meeting. Leave it with your host(s) to be read at a later time. This is a meeting - not a presentation - and it should be conducted in as informal a manner as possible to encourage an exchange of information and views.

## **Keep Checklists and Monitor Your Deadlines**

Check what you have and have not accomplished, contacts you have made and the results achieved. Pay special attention to the time-lines you have set in your plan so that you avoid missing deadlines. When the pressure is on, it is easy to lose track of an influential individual or group.

## **Step Six: Ask Yourself if it is Working**

No campaign ever proceeds exactly as planned. There are always surprises, unanticipated events, gains that come more easily than expected and unforeseen setbacks.

It is important to monitor your campaign at every step of the way to determine what is working, what isn't, and where action needs to be taken to keep on target.

## **Compare Progress to Goals**

Throughout the campaign keep comparing your actual progress to the goals outlined in your plan. If it becomes clear that a strategy is not working, try to determine why. What is the root problem? What can be done to address it?

## **Record Your Accomplishments**

Keep a list of every letter you write, every phone call you make, every meeting you attend, and any other lobbying action you take. Periodically

sit down to evaluate results. What have you accomplished? Where have you not had results? What lobbying efforts appear to have brought results? Which appear to be unsuccessful?

## **Share Information**

When something works, make sure you share it with others. When something doesn't work, try to figure out why, and share that information with others involved in the lobbying campaign.

## **Implications for Your Plan**

By asking the right questions throughout the lobbying campaign, by determining why problems happen and by taking steps to address them, you will go a long way to keeping on target.

# **Lobbying Plan Workbook**

(Set-up a page per Step from the text above)

Worksheet Step 1:

**ASSESS YOUR SITUATION**

Worksheet Step 2:

**SET YOUR GOAL**

Worksheet Step 3:

**DEVELOP YOUR CORE MESSAGE**

Worksheet Step 4:

**DEVELOP YOUR PLAN**

Worksheet Step 5:

**ACT ON YOUR PLAN**

Worksheet Step 6:

**ASK YOURSELF IF IT IS WORKING**

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