1. **Intro slide**

2. **What is Advocacy?**
Delivering a focused message to a specific audience to effect positive change.

Advocacy should be intentional, should demonstrate you and your library’s role and contributions, and should be considered an essential part of managing your library and carrying out your mission. In everything you do, every interaction you have, you’re either effectively advocating for your library, or you’re not. Take advantage of opportunities to share what’s going on in the library and how you’re working hard to help your colleagues.

Please keep in mind that I’m going big here. It will look like we’re preparing to wage a huge campaign with national political ramifications. Take what you need from this to accomplish your goal. You may not need every single step, but all of the principles will apply to any advocacy effort, large or small. If you’re trying to get a librarian into the collective bargaining agreement, you’re going to want to do all of this and more. If you need a new copier, it may not need to be as intense of an effort.

3. **Goal, audience, actions**
Author Dan Smith qualifies “‘good’ advocacy as being based on good strategy followed by good tactics.” So, strategy and tactics are coming into play, and those include several things we’ll be covering, including a well-defined goal, a clear sense of your audiences, and a set of actions most likely to achieve your goal.

Keep in mind that “Advocacy should begin well before you need to ask for something.” You may not have a need right now, lucky you, but you will someday, so now is the time to prepare.

4. **Why**
How do you establish a clear goal? Start by basing your efforts on a firm understanding about why you and your library matter. Most people are comfortable talking about what they do and how they do it. For example, “I process the manuscripts of leading American composers” is what I do, and you prepare music for your ensemble, but it’s not the “why” of what you do. While subjects such as marking bowings and digital licensing can provide some interesting insights, they are not likely to provide a compelling understanding for non-librarians and/or non-musicians of the value of our libraries and the profession.
5. **Continued**
To inspire others, we must connect or reconnect with the “why” we value the work we do, or why we are important. When we give voice to our “why,” we’re more likely to inspire others to understand, value, and support us. To get at the essence of what makes your work important, you may want to keep your “why” statement short. In order to effectively raise awareness and advocate for your needs, you need to be able to establish a solid foundation of what you see as the value and impact of your work. If you need help articulating your “why,” look to any personal statements or elevator speeches you’ve already prepared. If you don’t have one that you keep in your back pocket, I highly recommend you develop one that succinctly tells people what you do and why you love it, why it matters. Use every little opportunity to advocate for yourself to anyone in all situations.

So, remember the non-why statement from earlier? “I process the manuscripts of leading American composers.” Let’s see if this why statement is any better: “I love preserving and making letters, photographs, and manuscript music available to anyone and everyone. Being able to see a composer’s process of creation is fascinating, and my work allows others to learn from that and be inspired. I help people stand on the shoulders of giants.”

6. **Developing the Goal**
Next you need to clarify your goal. The points outlined on the slide can help you, and we’ll talk about each of these in more depth.

First, what is your biggest need? What do you see coming down the pike, or what are you already lobbying for? What change do you require?

7. **Goal: Alignment**
If at all possible, figure out how your need aligns with organizational mission statements and/or strategic plans or projects already underway. It is, essentially, piggy backing, and it may save you some amount of effort. I do this on a regular basis at the Library of Congress. In fact, in order to attend the Archives Leadership Institute at Purdue in 2021, I had to advocate for myself by saying how my receiving that training furthered the Library’s mission, goals, and objectives, point by point.

As an example, I found the strategic plan for the St. Louis Symphony. It took some work to figure out how to tie a new copier to that plan, but I think we could align the organization’s goal of “expanding the expressions of symphonic music” somehow with a goal of obtaining a new machine. So, this may be a silly example, but I hope it helps
illustrate what I’m talking about. If you’re seen pulling with the orchestra, in the same direction, you’re more likely to receive support.

8. Goal: Audience
When talking about advocacy, you essentially have four audiences. The first one we’ll talk about is the **target audience**. This is the person or people who hold the power to positively or negatively affect the success of your desired change. It’s their actions and behaviors that you want to affect.

When communicating with them, do remember to be respectful. I’m not talking just about etiquette. Respect includes being aware of the contexts in which they function. What are their responsibilities, pressures, needs, priorities, expectations, timelines, and parameters? What is their cultural context? What can you do for them? How might your advocacy effort, or any other service you provide, benefit them?

**Timing.** This can also be an aspect of knowing your target audience. Proper timing can also help you be more effective. For example, knowing where your organization is in the annual budget cycle can be important if that matters to your effort. If you advocate at the wrong time, such as just past the cycle, no one will remember your need nearly a year from then.

**Stakeholders** have some influence in how or whether you’re able to accomplish your goals. They’re a less direct audience, but will have a role nonetheless in your success. They can provide information, credibility, cooperation, funding, and so forth. If you’re targeting upper management, then your immediate boss counts as a stakeholder, as would anyone who is a resource allocator. Sidestepping stakeholders is absolutely not productive, ever. They really need to see the goal and the value of it. Your employees, part-timers, and volunteers can also be stakeholders, especially if the effort and goal will impact them.

**Supporters** can and will support your efforts. They would benefit from your success, so see if you can enlist them in your initiative. Supporters can include your union, a professional organization, the musicians, donors you’ve cultivated, composers and copyists, publishers, the public relations office, and so forth. Even if they don’t benefit from your efforts, they should be seeing the value and lending their assistance. Supporters can even potentially have a multiplier effect. Think about how their efforts and understanding can help, and what you’d like them to do.

Also know your potential **opposition**; anyone who would hamper your efforts. You may run into opposition from someone like a budget person who sees what you do as
somewhat tangential to the organization’s essential mission. Opposition can also come from anyone who is at odds with your intended goal, those competing against you for scarce resources, or those who just want to continue doing things the way they’ve always been done. Sometimes opposition comes from those who simply don’t know much about what you do. Don’t be offended, but take the opportunity to educate them. Plan for who might have issues, and what those issues might be. You can do this by asking yourself the hard questions that a skeptical person would pose to you, such as: Why do you need a photocopier, or another librarian? How would that benefit the ensemble or organization? Will it be worth the funding? How do you know that? Understanding their perspectives can hopefully help you win their buy-in.

The better you know the preferences, motivations, and concerns of your audiences, the better you can craft your message, know which methods to employ, who to convey the message to, and the actions needed to succeed.

9. **Goal: Audiences: Make a List**
We mentioned strategy early on, didn’t we? Taking a moment to think about exactly who you’re targeting, and why they may or may not support you, is exactly that. If you don’t think about it, or even sketch it out, you aren’t going to be prepared for that surprise meeting, or getting stuck with your target audience on an elevator. Use all of your limited opportunities to advocate for your need wisely.

Identify each of your possible target audience members, supporters, stakeholders, and opponents. Indicate their initial category, and then reasons for their support or concerns. If your list is too long and will strain your effort, scale back and pocket some solid wins before expanding. These will provide you with early supporters that can then influence others. Often this sort of phased approach is successful, though it does take longer.

The success of advocacy and awareness initiatives can be severely hampered when this assessment step is skipped. Don’t assume you know what your musicians and managers want, what motivates them, or what will speak to their interests. Do your market analysis and testing, as if you were launching a new product to discerning consumers.

10. **Goal: Outcomes and Benefits**
What would things be like if you got what you needed? What wonderful things happen for everyone when your goal is achieved? Think of all the benefits and write them down. Do any of them align with the organization’s goals? Are any of them a win-win for
others? You’ll need to be able to articulate why it’s important to get what you need, and what the benefits will be.

11. Goal: Reminder
Let’s take our need, any institutional alignment with existing projects or mission statement, our understanding of our audiences, and articulated outcomes and benefits, to craft our goal. A clear goal is essential for success. It provides that firm foundation you need for planning and execution. So yes, putting the time and effort into developing a clear goal is a wise investment.

12. Goal Development
Every advocacy initiative, big or small, needs a defined goal with a clearly articulated purpose. Reminder: goal(s) should identify a specific need targeted at a specific audience with specific outcomes that produce particular results and benefits.

Let’s take the example on the slide. Who’s the audience? The ED Alignment? Supporting the high performance standard of the orchestra Need? A way to make good copies fast, i.e. a new machine Outcomes? Better rehearsals and performances

13. SPIT Test
All right, now that we’ve got our key points lined up, let’s fine tune it. Your goal statement should succinctly deliver the concept and its purpose. Since you’re going to be repeating this goal statement, it should be easy to say and to remember. For maximum effectiveness, it should be:

- Specific
- Personal
- Informative
- Trustworthy

If your goal statement doesn’t pass this SPIT test, refine and edit it until it does. This core statement is your advocacy effort’s first impression. It is a powerful way to explain your initiative and provides a firm foundation for further messaging.

14. Compelling Messaging
Now that we’ve got our goal statement, our foundation, we can build compelling messaging on it.

Aim to spark feelings with your messaging. What do you want your audience to feel? Anger, compassion, outrage, pride? You may want different audiences to experience
different emotions, perhaps sparking pride in your management while sparking compassion from musicians.

Storytelling can be used as a compelling messaging device. A list of bullet points engages the language decoding portion of the brain, but a story lights up many parts of the brain. Make sure that the story aligns with the interests of your audience. Let’s say the ED’s daughter plays saxophone. Is there a good saxophone anecdote that helps convey the issue you are advocating? Perhaps the best stories are those with outcomes that show the positive impact of our work, our aspirations, or how you were able to once again save the day. How many times last year did you rescue a guest artist or conductor? Were you able to save the orchestra money in some way by doing x or y? When you had extra help, what great thing did the library accomplish? Identifying outcomes and impacts will mean staying in touch with your musicians, staff, and management. Regularly capturing these stories can substantially benefit your advocacy efforts.

Just remember that as compelling as storytelling can be, you should back it up with credible data if you can. Keep track of things. Do some number crunching. That became more and more important the longer I was at the Marine Band. Managers are more and more driven by numbers - old trends from the business world have crept over into the arts and are seen as new and shiny. The arts are harder to quantify, but it doesn’t stop managers from trying.

Taking a moment to write down your message, explain the data, and capture compelling stories helps clarify your information and gets you ready to deliver it and build on it. If applicable, graphs, charts, and images are also great at helping us communicate, so get all those things ready so they’re on hand when and where you need them. Just make sure they’re clear and easily understood.

15. **Identify communication approaches and techniques**
Plan and prepare for how you will share information. You’ve just crafted the best goal statement ever, but how are you going to share it? Make sure that the information is adaptable depending on the audience, timing, and situation for maximum effectiveness.

Face-to-face meetings are proven to be better at building trust, establishing relationships, and engendering positive responses and emotions from your audience. So, don’t just email. Engage in real time conversations.
Are you asking for action or support? Make it clear from the outset, and repeat. Whether formal or informal, be prepared to focus on core points in a way that is tailored to your audience and their interests at that moment.

Communicating is not only speaking, it is also listening. When you’re talking with someone, or if you’re in a meeting, give people a chance to interject, ask questions, and comment. You’ll need this feedback to know how to adjust and adapt to move forward.

Have you prepared your elevator speech on this topic? Again, be prepared wherever you find yourself to lobby for what you need. While you may have 30 seconds, a human can lose interest in less than ten seconds, which is allegedly the attention span of a goldfish. Use this valuable time to engage their interest and make them curious to know more.

16. Assessment
So, how did your campaign go? Were you a quick success, or were there bumps along the way? Next year you know you’ll need another big-ticket item, so how can that go better?

Assessing how you did, or how things are going if you’re waging a long campaign, such as one to hire more staff or join the CBA, will help you mark progress and adjust when and if necessary. How are things going? Are you on track to meet your goal? Do you need to adjust your strategy, techniques, statement, or even the goal itself? Has the goal post moved? If you don’t stop to check in periodically, things can lose steam, they can get off track, and you could be wasting time on efforts that are no longer effective. What is going well, and what is no longer working?

17. D.C. al coda
Lest I oversimplify, advocacy seems to boil down to knowing why you’re trying to change something, who needs to know it, and then communicating to them about it strategically and persuasively.

A well-articulated goal tied to organizational mission is essential, and planning that addresses those goals will have more impact. Planning saves you time in the long run by keeping you from going off the rails with great-sounding ideas that don’t really support your goal.

Listen to your audiences - learn what speaks to others and engages them rather than what interests us. Don’t make assumptions. People are usually good at telling you what matters to them.
Hone your skills - since we often work behind the scenes, we might be perceived as introverts and not enjoying being in front of people. But regardless of personality, anyone can practice and improve their advocacy skills. Start by leveraging your strengths.

Don’t forget to persevere. While some efforts are relatively short, others that require changing existing systems or structures will take more time. Recognizing this will help you plan to play the long game and stick with it.

18. Checklist
To help, I’ve provided a handy checklist and worksheet you can strategically use in your advocacy efforts. This can help you plan your tactics to succeed.


