

TO: ALA Executive Board

RE: Advocacy Plan

ACTION REQUESTED/INFORMATION/REPORT:
The ALA Advocacy Plan

ACTION REQUESTED BY:

N/A

CONTACT PERSON:
Gerald Hodges, Associate Executive Director, Communications and Marketing

DRAFT OF MOTION:

DATE: April, 2004

BACKGROUND:

These materials will provide background for the discussion regarding the advocacy plan.

Attachments

Background of ALA Advocacy Events

- 1991-1992 ALA President Patricia Glass Schuman sponsors media training for chapter leaders under *Your Right to Know* campaign
- 1994- 2000 Library Advocacy Now! Network established; trainings in over 40 states. Trainings include *Equity on the Information Superhighway*, *Library Advocacy Now* general advocacy trainings, and *Intellectual Freedom Advocacy* trainings.
- Fall 2000 Advocacy Summit, Washington DC: it's decided that there would be a permanent place for advocacy in ALA, coordinated by the Public Information Office. Advocacy specialist position created within PIO.
- May 2002 Advocacy Retreat in Chicago
- Jan. 2003 Advocacy Business plan drafted; accepted by Board Spring 2003
- Dec. 2003 Patricia Glass Schuman meets with Keith Michael Fiels develop a new Strategic Plan for Advocacy, which will incorporate all past activities and documents, while allowing a place for all areas of ALA with a stake in advocacy to present their goals, objectives and activities.
- Jan. 2004 Preliminary outline for this new document shared with Public Awareness Committee at ALA 2004 Midwinter Meeting.

Advocacy Notebook

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ALAction 2005

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@ your library®, The Campaign for America's Libraries

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President

President Elect

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Development Office

Governance Office

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Office for Accreditation

Office for Diversity

Office for Government Relations

Office for Human Resource Development and Recruitment

Office for Information Technology Policy (OITP)

Office for Intellectual Freedom (OIF)

Office for Literacy and Outreach Services (OLOS)
Office for Research and Statistics (ORS)
Public Information Office (PIO)
Public Programs Office (PPO)
Washington Office

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Association for Library Collections and Technical Services
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Association for Library Trustees and Advocates
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Project Title: ADVOCACY INSTITUTES

Abstract

Libraries across the United States – whether they are public, school, college or university libraries – report an ever-increasing number of challenges to their budgets, governance, collections, and ultimately, their viability. Until now, there has been a crucial missing link in library advocacy: the need for ongoing interaction between advocates of all types (Trustees, Friends, library users, administrators, librarians and library support staff) – at all levels of experience. It is critical that the library community, including Trustees, Friends, and the millions of Americans who consider libraries to be a priceless asset to work together to effectively communicate with and to influence decision-makers. These proposed Advocacy Institutes are the first action in achieving this envisioned future of grassroots library advocacy. The Advocacy Institutes will be a benchmark for collaboration among advocates nationwide.

ALA's mission is to provide leadership to ensure access to all. ALA has long considered advocacy on behalf of library services and the citizens who receive them to be critical. The Institutes will help achieve the goals of ALAction 2005 by increasing support for libraries, librarians and library support staff by communicating clearly and strongly why they are unique and valuable; by creating productive partnerships to increase the reach of this critical message; and by delivering this message effectively in a broad range of communities and situations.

The Advocacy Institutes will be held in conjunction with the 2005 ALA Midwinter Meeting and 2005 ALA Annual Conferences. Unlike past ALA advocacy initiatives such as the train the trainer programs, the Institutes will embrace peer-to-peer modeling for the growth of grassroots advocates, and have as its key components:

- An all-day Institute where advocates will form statewide coalitions or “teams” of librarians, library support staff, Friends and Trustees armed with the tools to affect and sustain change in their communities;
- New resources to help advocates assist their libraries at the local level, including databases of best practices, key messages, an advocacy network, and an online toolkit of material geared to the user; and
- The beginnings of the much-needed connection from the national association to the local level, as well as to key affiliates, via evaluation processes prior to and after the Institute. These will allow ALA to create and sustain communication channels at the local level, as well as to evaluate the success of the program.

The Institutes will provide the participants with the skills, knowledge, and resources to return to their communities and effectively communicate with local, state and national leaders in the legislative and public policy arenas. The Institute participants will take away specific strategies to act on local issues like funding, bond referenda, and gain

insight how national issues affect them locally and to frame messages to the community on topical issues like CIPA and the USA PATRIOT Act. The Institute participants will become a core group of advocates and will be part of a network of individuals within their own state to alert advocates to pertinent issues to utilize the new resources made available as part of this project.

The project will include a comprehensive evaluation of the effectiveness of the Institutes and the effectiveness of the resource tools. The intent is that the Advocacy Institutes will continue beyond the scope of the Goal Award, as a yearly event beginning in 2006.

Project Proposal

The Advocacy Institute project focuses on identifying, training, providing on-going information and support, and enhancing communication and networking among “grassroots” library supporters. Through the Advocacy Institute, participants will have the opportunity to learn about issues critical to libraries, and to gain skills and information necessary to communicate with legislators and policy-makers.

A nationwide call for participants will be distributed through Chapters, FOLUSA and State Friends Groups, and the American Library Trustee Association (ALTA) in order to foster the much needed core coalition. To further enhance opportunities for participation and networking, a call for participants will be distributed through Divisions and Affiliates, including National Association to Promote Library and Information Services to Latinos and the Spanish Speaking (REFORMA), Black Caucus of the American Library Assn. (BCALA), Chinese-American Librarians Association (CALA), Asian/Pacific Librarians Association (APALA), American Indian Library Association (AILA), and other library organizations.

All organizations will be asked to recommend key advocates from their state, whether they are Friends, Trustees, library staff, school administrators, school board members, or members of governing boards of colleges or universities, ideally resulting in teams of at least three members (Friends, Trustees, librarians and library support staff), plus other key advocates in a given state.

Each participant will bring their commitment to libraries and their local knowledge and connections. Through participation in the Institute, they receive specific training and access to new resources to assist them in making the case for libraries most effectively. Surveys prior to the Institute will assure the program focuses on the issues the participants view as a priority and they identify as those in which they most need assistance.

Statement of Problem

There has never been a more critical need for libraries to reach and influence those determining public policy, or a more important time to be an advocate on behalf of libraries. Those who value libraries recognize their viability is threatened on many fronts. Patrons, Friends, school administrators, school board members, college or university governing board members, librarians and library support staff must develop the skills to speak effectively to decision-makers in local, state, and national legislative and public policy arenas.

Program Outline

Each Institute will have three key components:

- New resources to help advocates assist their libraries at the local level, including databases of best practices, key messages, an online advocacy network and an online toolkit;
- An all day Institute where advocates will form statewide coalitions or “teams” of librarians and library support staff, Friends and Trustees armed with the tools to affect and sustain change in their communities; and
- Extensive evaluation processes that will allow ALA to create and sustain communication channels to the local level, as well as to evaluate the success of the program.

On-site at the Institutes, participants will take away specific strategies to act on local issues like funding, and bond referrals. Participants will learn from other successful library advocates how national issues affect them locally, and how to frame messages on topical issues like CIPA and the USA PATRIOT Act to their communities.

After each Institute, participants will receive additional information and support through comprehensive evaluations and surveys, electronic mail lists and a new Web site devoted to advocacy issues, materials, and success stories. This group of advocates will form the core of a nationwide advocacy network that will work to alert communities to pertinent issues and resources available. Advocates need to have ready access to current information on issues, easily adapted materials to serve as background papers and talking points, and the ability to contact peers to learn and share information.

Evaluation and Dissemination

Evaluation will begin as soon as 2004 and will end in 2006. The program will allow:

- Assessment of the needs of state and local libraries prior to the Institute, thereby creating a tailored program for participants;
- Evaluation of the usefulness of the institute and materials; and
- Monitoring of the successfulness of coalition building in each state.

ALA plans to continue the institute once yearly beyond the reach of the Goal Award.

Staff/Personnel

Project coordinators:

Carol Brey-Casiano, *2004-2005 ALA President*

Patricia Glass Schuman, *ALA Past President, 2003-2004 Chair, Public Awareness Committee*

Sally Reed, *2004-2005 Chair, Public Awareness Committee;*

Executive Director Friends of Libraries USA

Shirley Buursama, *2003-2004 ALTA President*

Marguerite Ritchey, *2004-2005 ALTA President*

Gail Dysleski, *ALTA Past President; Chair, ALTA Advocacy Committee*

Charles Beard, *2003-2004 Chair, Chapter Relations Committee*

Ling Hwey Jeng, *2004-2005 Chair, Chapter Relations Committee*

Jan Sanders, *2003-2005 Chair, Committee on Legislation*

ALA Staff:

Kerry Ward, *Director, Association for Library Trustees and Advocates,*

Michael Dowling, *Director, Chapter Relations/International Relations*

Marci Merola, *Advocacy Specialist, Public Information Office*

Mark Gould, *Director, Public Information Office*

Gerald Hodges, *Associate Executive Director, Communications and Marketing Department*

Emily Sheketoff, *Associate Executive Director, Washington Office*

Budget

The proposal requests \$10,000. A detailed budget is attached as Appendix A.

Impact of Proposal

The Advocacy Institute will serve as the basis for a nationwide, coordinated advocacy effort on the part of a broad coalition of library supporters. Until now, there has been a missing link in advocacy efforts. While legislation and public policy decision affecting libraries happen in state capitols or in Washington, DC, the most effective advocacy efforts often occur at the local, grassroots level. Harnessing this grassroots impact is key to assuring libraries thrive as valued institutions.

ALA's position as the primary source for information and guidance regarding legislation and public policy issues affecting libraries will be strengthened by development and promotion of the Advocacy Institute.

Unlike previous advocacy initiatives, the Advocacy Institutes embrace peer-to-peer modeling for the growth of grassroots advocates. Key components include two all-day

Institutes, where advocates will form statewide coalitions or “teams” of librarians, library support staff, Friends and Trustees armed with the tools to affect and sustain change in their communities; new resources to help advocates assist their libraries at the local level, and the beginnings of the much-needed connection from the national association to the local level, as well as to key affiliates. Evaluation processes prior to and after the Institute that will allow ALA to create and sustain communication channels at the local level, as well as to evaluate the success of the program.

ALA Chapters, Divisions, and Affiliates will use the program as a way to assess and attend to across-the-board-needs, tailoring materials to individual teams, fostering a coordinated grassroots effort in each state and creating a sustainable format that will build on itself in years to come.

Timeline

The project timeline is attached as Appendix B.

Toolkit

A list of the resources comprising the Toolkit is attached as Appendix C.

Institute Agenda

An agenda for the Advocacy Institute is attached as Appendix D.

APPENDIX A

ADVOCACY INSTITUTES

Project Budget

Total request: \$10,000

Project Coordinator for writing new materials and repackaging existing resources	5,000.00
Web site creation/support	2,000.00
Publicity/Promotion materials	1,000.00
<u>January, 2005 Institute</u>	
Advocacy Toolkits	1,000.00
<u>June, 2005 Institute</u>	
Advocacy Toolkits	1,000.00
Total	<u>\$10,000.00</u>

In kind contributions would include:

- Staff time as needed from ALA Association of Library Trustees and Advocates, Public Information Office, Chapter Relations Office, Washington Office;
- Customary Public Information Office budgetary support for printing and dissemination of advocacy materials; meeting space and equipment for programs;
- Support from the budget of 2004 ALA President Carol Brey-Casiano;
- Chapter support – conference space and equipment.

APPENDIX B

ADVOCACY INSTITUTES

Project Timeline

May/June 2004	Grant awarded.
June 2004	ALA Chapters, Divisions and Units notified of grant and invited to participate. Promotion of Midwinter Institute at 2004 ALA Annual Conference through presentations at Chapter Relations Committee meetings and advocacy meetings. Project Coordinator to be hired.
June-August 2004	Speakers contracted for Institute at 2005 ALA Midwinter Meeting.
September 2004	Publicity/registration materials disseminated for 2005 ALA Midwinter Institute. Institute pre-survey created and distributed.
November 2004	Electronic discussion list for Institute participants created
January 2005	Institute held – 2005 ALA Midwinter Meeting, Boston.
January/February 2005	Institute evaluations compiled; summary report prepared.
March-April 2005	Speakers contracted for Institute at 2005 Annual Conference, Chicago.
April 2005	Publicity/registration materials disseminated for Annual Institute. Institute pre-survey revised, prepared and distributed.
June 2005	Institute held - 2005 ALA Annual Conference, Chicago.
June 2006	Final evaluations of year-long project. Second-phase of Institutes implemented.

ADVOCACY INSTITUTES RESOURCES

Proposed Databases:

Best Practice Database:

Real-world case histories of how libraries handled issues in their community. Local, state and regional histories are welcome. Topics would include building a new library building; maintaining and increasing budgets; passing bond referenda. Users could sort by topic to see how librarians have solved similar problems in their states; or by state, to ascertain the topics important to their community.

Key Message Database: ALA is asking its members to stand up and speak out for libraries, but advocates may face tough questions from decision-makers, patrons or citizens at large. This database will arm ALA advocates with key talking points on issues like the USA PATRIOT Act, internet filtering, ALA's key action areas, and other pertinent topics. Will be sorted by topic.

Advocacy Network: This online listing of names and contact information for our key Advocate members will allow open communication and networking opportunities.

Proposed Online Toolkit:

A modular and online approach to advocacy resources, where advocates can select topics "on demand" and download one-page tips on advocacy. Topics would include how to prepare to speak to a group, best practices for talking to the media, and tips for working with decision-makers.

Print Publications

Library Advocacy Now Handbook
A Library Advocate's Guide to Building Information Literate Communities
Libraries and the Internet Toolkit
Save America's Libraries Toolkit
Quotable Facts about America's Libraries
Advocacy Presenter's Guide
Advocating for Better Salaries and Pay Equity Toolkit
The Campaign for America's Libraries Toolkit for School Library Media Programs
The Campaign for America's Libraries Toolkit for Academic and Research Libraries

Reprinted Articles:

"Speaking Up and Speaking Out: Ensuring Equity" through Advocacy by Patricia Glass Schuman. *American Libraries*, October 1999.

"Say the Right Thing: Winning Strategies for Talking to the Press" by Patricia Glass Schuman, *School Library Journal*, September 1998.

APPENDIX D

**ADVOCACY INSTITUTES
PROPOSED AGENDA
ALA MIDWINTER CONFERENCE
Friday, January 14, 2005
Boston, MA**

8am – 8:15 am	Registration check-in Welcome/Introductions Overview of the Day
8:15 – 9:00 am	<u>GRASSROOTS ADVOCACY</u> Carol Brey-Casiano, President American Library Association
9:00 –9:45	<u>SUCCESS STORIES: LOCAL EFFORTS THAT WORK</u> Sally Reed, Executive Director, FOLUSA Ling Hwey Jeng, Chair, Chapter Relations Committee Patricia Wickham, Vice-President for the El Paso Public Library Association, Board of Directors
9:45 – 10:00 am	BREAK
10:00 – 11:30	<u>LOBBYING 101</u> Glenn Miller, Executive Director Pennsylvania Library Association
11:30 – 12:45	HOT ISSUES: MESSAGES FOR YOUR COMMUNITY & NETWORKING LUNCH State Issues from breakont sessions by state/region
12:45 – 1:15	<u>SUCCESSFUL LEGISLATIVE DAYS</u> Bob Doyle, Executive Director Illinois Library Association
1:30 – 2:00 pm	<u>WHEN THE MEDIA CALLS: ANSWERING THE TOUGH QUESTIONS</u> Patricia Glass Schuman
2:00 – 2:15	BREAK
2:15 – 3:00	NATIONAL LEGISLATION, LOCAL IMPACT Emily Sheketoff, Assistant Executive Director ALA Washington Office
3:00 – 3:45	TEAM BUILDING & ACTION PLANS Patricia Glass Schuman Gail Dysleski, Advocacy Committee Chair, ALTA
3:45 – 4:15	NEXT STEPS & CLOSING REMARKS Carol Brey-Casiano, ALA President