Name

ADVOCACY ACTION PLANNING WORKBOOK

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PURPOSE

We have put this workbook together for the Queensland Public Libraries Association and State Library of Queensland conference on 17 and 18 September, 2012 – *LibrRaries: the 4th R.*

We are presenting at different times on different days, but we have got together to produce this joint workbook that links our two sessions. The purpose of the workbook is to help Queensland public library teams plan their own advocacy campaigns, incorporating the findings of The Library Dividend study of the economic benefits of Queensland public libraries to their communities.

It is in two parts, firstly advocacy planning, and secondly, library metrics. By filling in the workbook during our two presentations, by the end of the two days, attendees should already be a good way along the process of developing their advocacy strategy.

About Sue Henczel

Sue Henczel has held management and operational positions in government, corporate, public and academic libraries and for an academic library consortium providing services to libraries in all sectors. She is a Director on the Public Libraries Australia Board, a member of the Library Management (Emerald) Editorial Board and is its Book Review Editor, a member of the ASLIB (UK) Advisory Council, and a Fellow of the Special Libraries Association (SLA). Sue served two terms as a member of the IFLA Standing Section Committee on Statistics and Evaluation and was the inaugural Convener of the Committee's e-metrics special interest group.

About Sue McKerracher

Sue McKerracher is a marketing and communications specialist, originally from the UK, where her clients included the British Library and the Museums Libraries and Archives Council. Now based in Australia, she delivered ALIA's Every Member an Advocate workshops in 2010; has helped run successful lobbying campaigns for funding for new libraries, and was engaged by a consortium of state and territory libraries and public library associations to develop the National Year of Reading 2012. In August 2012, she took up the position of executive director of ALIA.

PART 1
ADVOCACY PLANNING

Why advocate

Is your library service well funded, valued, secure? Few library services in Australia and worldwide can answer a resounding yes to this question. Even those that are currently in a good position sense that it only needs a change in council or a new executive who doesn't appreciate the role and worth of public libraries for the environment to change.

A planned advocacy campaign is a way of influencing the long term outcome for your library service.

Defining advocacy and lobbying

Advocacy is the act of pleading for, supporting or recommending a cause, idea or policy.

Advocacy (general influence):
- Leverages the positives
- Gets people onside as supporters
- Articulates the 'good' of libraries through what we say and do.

Lobbying is the process of influencing public and government policy.

Lobbying (focused influence):
- Deals with negatives
- Presents arguments using facts, stories etc. for a specific purpose
- Aligns with government policies and priorities.

Creating advocates – by what we say and do

Advocacy begins with the people who believe in libraries – library staff, library users, Board members, friends, volunteers, and you.

You have opportunities to create advocates everyday as you do your job.

The way in which you interact with library users, councillors, council staff, community groups, associations and organisations is critical in forming their view of the library service.

1 MAPPING THE CURRENT SITUATION

1.1 How would you rate the support of:

	LOW	GOOD	EXCELLENT
COUNCILLORS			
COUNCIL EXECUTIVES			
THE COMMUNITY			
YOUR OWN TEAM			
OTHER INFLUENCERS			

1.2 Who are your existing champions?

1.3 What assets do you have? The Library Dividend findings, a legacy of successful campaigning, active involvement in the National Year of Reading.

1.4 What memorable messages, killer statistics, startling facts, quotable quotes and remarkable stories do you have to tell about your library service?

1.5 What would your advocacy SWOT analysis look like?

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

2 DEFINING YOUR OBJECTIVES

What do you need to achieve with your advocacy?

GOAL 1 –eg collaboration across other departments in Council	
GOAL 2 – eg higher level of funding by Council	
GOAL 3 – eg more partnerships in the community	
GOAL 4 – eg underpin the business case for more staff/resources	
GOAL 5 – eg build a platform for lobbying for a new library	

3 CREATING THE PLATFORM

3.1 Libraries are a good fit with:

	WHAT THEY SAY	WHAT WE SAY
QUEENSLAND STATE GOVERNMENT VISION/OBJECTIVES		
COUNCIL VISION/OBJECTIVES		
COMMUNITY VISION/OBJECTIVES		

3.2 A good group of advocates

Natural advocates include school principals, authors, the media (journalists and writers feel an affinity for libraries). Potential advocates include doctors, real estate agents, booksellers, aged care operators and literacy groups. Who would you like to have as your champions and supporters?

3.3 A strong case for libraries

	WHAT WE HAVE AVAILABLE	SUPPORTING COLLATERAL
COMMUNITY BENEFITS AND VALUE		
STATISTICAL EVIDENCE		
STORIES ABOUT YOUR LIBRARY'S IMPACT		

3.4 What are our key messages?

4 PLANNING YOUR CAMPAIGN

This is what we want to achieve (goals from page 5) … In order to achieve them, we will:

- Align with government, council and community objectives (page 6)
- Recruit effective advocates (page 6)
- Build a strong case for libraries (above)
- Source and create supporting collateral (above)
- Provide ourselves and our advocates with key messages (above)
- Communicate widely.

4.1 What will your communications plan look like?

Audience	News/ information	Media/ channel	Collateral	Timing and responsibility

4.2 What additional resources do you have/will you need?

	Currently available	To be developed
Standard Powerpoint presentation that can easily be adapted		
Script about your libraries that everyone can use		
Quality photographs of your library service in action		
Charts to illustrate statistical evidence		
Quotes from library advocates, local, national, international		
Other		

4.3 What opportunities already exist for promoting your library service?

	CURRENT INVOLVEMENT	FUTURE INVOLVEMENT
COUNCIL MEETINGS		
EXECUTIVE MEETINGS		
COMMUNITY MEETINGS		
FESTIVALS AND EVENTS		
LOCAL MEDIA		
OTHER OPPORTUNITIES		

4.4 What opportunities can you create for promoting your library service?

OPPORTUNITY 1	
OPPORTUNITY 2	
OPPORTUNITY 3	
OPPORTUNITY 4	
OPPORTUNITY 5	

5 WHAT DOES SUCCESS LOOK LIKE?

5.1 Set targets, recognise achievements and celebrate your success.

KPI	TIMING	RESPONSIBILITY

5.2 The advocacy wheel

This is a generic advocacy wheel – what would yours look like?
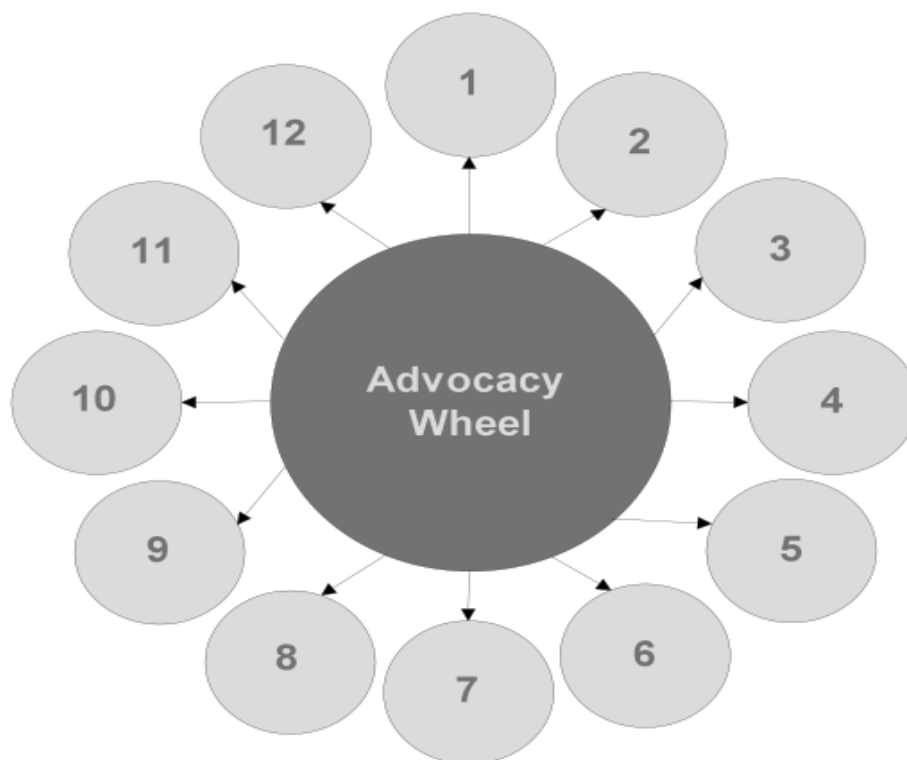
PART 2
LIBRARY METRICS IN THE CONTEXT OF ADVOCACY

The importance of consistent measures

To use our measures for regional, sector, national and international reporting they must be:

- Consistently collected and all following the same definitions and descriptions
- Aggregated reliably
- Used in context.

Using the ISO standards will help with comparability of data through the provision of a standardized terminology, definitions and descriptions.

- Definitions of data elements mean that when we count something we all count the same thing.
- Descriptions of data elements mean that we all count the same way.
- Definitions and descriptions of performance indicators mean that when we construct a performance indicator we all do it the same way, using the same data elements.

1 STATISTICS AND PERFORMANCE INDICATORS

These data elements and performance indicators are taken from ISO 2789 and ISO 11620. Which ones do you use?

STATISTICS (FROM ISO 2789)			
Number of loans		Training sessions conducted	
Use of electronic databases		Items acquired	
Number of e-resources		Items processed	
Number of downloads per person		Seats available	
Number of library visitors		Shelving capacity	
Weekly opening hours		Number of events in library	
Number of reference questions		Hits per page on library website	
Number of registered library users		ILL fill and request rates	
Number and levels of library staff		Gate count	
Size of collections		In house use of resources	
Size of budget		Number of holds	
Library expenditure		Donations	
		TOTAL	

Statistics (from ISO 11620)			
User area per capita		Collection use (turnover)	
Seats per capita		% of stock not used	
Staff per capita		Loans per capita	
Market penetration		Seat occupancy rate	
User satisfaction		Number of downloads per capita	
% of rejected sessions		Attendances at events per capita	
Expenditure on information provision per capita		Wait time for requested items not on shelf	
% of required titles available		% of loans to external users	
ILL requests (received and requested)		Ratio of acquisitions costs: staff costs	
Cost per user/per visit/per use/per item processed/per download		Acquisition speed/processing speed	
% of library staff providing and developing electronic services		% of acquisitions expenditure spent on electronic collections	
% of library funding achieved through grants/income generation		Total	

2 SELECTING YOUR MEASURES

These data elements and performance indicators are taken from ISO 2789 and ISO 11620. Which of them might underpin your advocacy statements?

Statistics			
Collection		Library staff	
Number of books and serials (printed)		Total staff – general	
Number of eBooks		Total staff – professional staff	
Number of databases		Total staff – qualified specialist staff	
Current serials received – electronic		Total staff – other	
Current serials rec'd – print /microform		Total staff – student assistants	
Number of cartographic documents		Volunteers	
Number of printed music documents		Staff training	
Number of patents		Professional education	
Number of manuscripts		Staff allocation to service areas	
Number of microforms		Total staff – general	
Total serials received			
Free internet resources catalogued			

STATISTICS			

LIBRARY USE AND USERS		ACCESS AND FACILITIES	
Number of users		Opening hours	
Number of loans		Days open	
Inhouse use		Seats	
Reservations		Public access workstations	
Information requests		Catalogue records	
Copying – by library		Photocopiers	
Copying – by users		Space – usable area for functions	
Interlibrary lending – within the country		Space – usable area by function	
Interlibrary lending - international		Space – gross area of buildings	
Electronic document delivery		Space – shelf counts	
Events organised by the library			
Visits			
User orientation and training			

EXPENDITURE			
Operating – employees		Operating – premises	
Operating – acquisitions		Operating – automation	
Operating – external document supply and ILL		Operating – open access publishing fees	
Operating – collection maintenance		Operating – miscellaneous	
		Capital expenditure – income and funding	

PERFORMANCE INDICATORS			
RESOURCES, ACCESS AND INFRASTRUCTURE - COLLECTION		RESOURCES, ACCESS AND INFRASTRUCTURE - FACILITIES	
Required titles availability		Public access workstations per capita	
% of required titles in the collection		Workstation hours per capita	
% of rejected sessions		User area per capita	
Subject catalogue search success rates		Seats per capita	
		Hours open compared with demand	

PERFORMANCE INDICATORS				
RESOURCES, ACCESS AND INFRASTRUCTURE - ACCESS			RESOURCES, ACCESS AND INFRASTRUCTURE - STAFF	
Shelving accuracy			Staff per capita	
Median time of document retrieval from closed stacks				
Speed of interlibrary lending				
% of successful interlibrary loans				

USE – ACCESS			USE – COLLECTION	
Library visits per capita			Collection turnover	
% of information requests submitted electronically			Loans per capita	
% of external users			% of stock not used	
% of the total library lending to external users			Number of content units downloaded per capita	
User attendance at library events per capita			Inhouse use per capita	
Number of user attendances at training sessions per capita				

USE - FACILITIES			USE - GENERAL	
Public seating occupancy rate			% of target population reached	
Workstation use rate			User satisfaction	
EFFICIENCY – COLLECTION			EFFICIENCY – ACCESS	
Cost per loan			Acquisition time per unit	
Cost per database session			Processing time per unit	
Cost per content unit downloaded				
Cost per library visit				

EFFICIENCY – STAFF			EFFICIENCY - GENERAL	
User services staff as a % of total staff			Cost of library service per user	
Correct answer fill rate				
Ratio of acquisitions expenditures to staff costs				
Employee productivity in media processing				

PERFORMANCE INDICATORS	

POTENTIALS AND DEVELOPMENT - COLLECTION	
% of expenditure on information provision spent on the electronic collection	

POTENTIALS AND DEVELOPMENT - STAFF	
% of staff providing electronic services	
Number of attendance hours at formal training lessons per staff member	

POTENTIALS AND DEVELOPMENT - GENERAL	
% of library budget received by special grant or income generated	
% of institutional budget allocated to the library	

4 IMPACT STATEMENTS

Impact statements focus not on how big we are or how much we do, but rather the difference we make.

(a) What impacts might your library service have on the following areas locally?
(b) What are some possible indicators that could be used in each category?

EDUCATION IMPACTS	
POSSIBLE INDICATOR/S	
HEALTH IMPACTS	
POSSIBLE INDICATOR/S	
CULTURE AND LEISURE IMPACTS	
POSSIBLE INDICATOR/S	

ECONOMIC IMPACTS	
POSSIBLE INDICATOR/S	
COMMUNICATION IMPACTS	
POSSIBLE INDICATOR/S	
EGOVERNMENT IMPACTS	
POSSIBLE INDICATOR/S	

PART 3
REFERENCES

Advocacy in Action: a toolkit for public health professionals. 2nd edition. Public Health Advocacy Institute of Western Australia

ISO 2789: (2006) Information and documentation – International library statistics. 4th edition (2006). Geneva : International Organization for Standardization.

ISO 11620 (2008) Information and documentation - Library performance indicators. 2nd edition (2008) Geneva : International Organization for Standardization.

ALIA advocacy resources:
http://www.alia.org.au/advocacy/