

How to conduct outreach activities with a limited budget

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How to conduct outreach activities with a limited budget

Outline

This workshop will examine the development of an **Advocacy Plan with outreach activities** which an archival institution could implement with a limited budget to develop awareness.

In the first part of the workshop, we will cover planning, reaching out, and using communication tools in order to empower participants wishing to conduct outreach activities.

In the second part of the workshop, we will cover practical ways to get media attention and advocate.



How to conduct outreach activities with a limited budget

Learning Outcomes

Being able to:

- Prepare an Advocacy Plan including goals and objectives, target groups, delivery methods, activities to be undertaken with a limited budget
- Reach out and develop awareness for services
- Advocate the importance of your institution
- Choose the right communication tools and outreach resources
- Improve skills to reach the general public, users, stakeholders, political levels of government and media



How to conduct outreach activities with a limited budget



Part 1

Writing an Advocacy Plan and developing awareness



Writing an Advocacy Plan and developing awareness

1. Goals and objectives

First of all, you need to identify your **goals and objectives**. It is very important to know exactly what you want to achieve.

It is important to **complete a plan** before you start advocating, because each part of the plan can affect the others.

Normally, planning your goals comes first--but you may have to change your plan or make adjustments if you find, at a later date, that the activities you were hoping to use might not work.

Planning is best done as a group activity because implementation often depends on team work. The actual format of the plan is not important. However you should write down the plan in a format everyone can use.



Writing an Advocacy Plan and developing awareness

1. Goals and objectives

If you are asked what the goal of your advocacy campaign or group is, your answer may come out in the form of a **mission** statement: "Our goal is to acquire, process, preserve and make available records from local families".

However, for planning purposes, goals should be split down into much more **specific steps**. Remember that it is better to keep your focus on a relatively narrow, manageable group of issues, rather than letting yourselves try to cover too much ground, and lose strength in the process. It's also important to split up the goals according to your time frame.



Writing an Advocacy Plan and developing awareness

1. Goals and objectives

Long-term goals spell out where you want to be by the end of a few years. Examples:

- Ten years from now, the number of our acquisitions will have increased by 50% to document better the history of our community (awareness campaign for acquisitions)
- In four years, we will reduce our processing backlog by 30% to serve better our community (awareness campaign for increased resources)

Short-term goals help keep a group motivated, providing more immediate benchmarks in the form of action steps. Examples:

- By June, we will have raised \$15,000 to hire a contract archivist.
- By June we will have collected 300 new signatures to support the Universal Declaration on Archives (UDA).



Writing an Advocacy Plan and developing awareness

1. Goals and objectives

Here is how **SMART goal-planning** works:

- (S)pecific. The more specific you can be about what it is you want your group to achieve and by when, the better.
- (M)easurable. Put your goals in measurable terms with numbers. The more precise you are about what you want to get done, the easier it will be to see what and how much your group has accomplished. This may prove to be essential if you are carrying out a systematic evaluation of your advocacy campaign.
- (A)chievable. You should also remember to set realistic goals that your group can actually achieve. Of course you need resources (time, people,..) to achieve the goals
- (R)elevant (to your mission). You should be setting goals that will start your group on the path to successfully accomplishing its mission.
- (T)imed. A date for completion should be set.



Writing an Advocacy Plan and developing awareness

2. Target markets

When you have decided on your goals and objectives, then you can begin to work out who are the **targets** you need to reach and convince. Your target markets are your **stakeholders or the groups or individuals** whom you believe should be made aware of what you wish to promote.

If you need a hint to help identify an appropriate group, look at the **mandate** of your institution (to whom do you provide services?)

or look at the **Universal Declaration on Archives** stating that:

the collective responsibility of all – citizens, public administrators and decision-makers, owners or holders of public or private archives, and archivists and other information specialists – in the management of archives.



Writing an Advocacy Plan and developing awareness

2. Target markets

The UDA provides a comprehensive list of stakeholders that can be used to decide which groups need to be prioritized and why. Stakeholders are those people and organizations who may affect, be affected by or perceive themselves to be affected by a decision or activity.

How to define your target groups:

Example :

Your **internal stakeholders** (within your organization) may include business units and employees of the organization, archival staff and volunteers, archival students, records managers, librarians and conservators.



Writing an Advocacy Plan and developing awareness

2. Target markets

Your **external stakeholders** may include clients, customers, public lobby groups, business partners, members of the public with an interest in areas which often depend on archives, such as governance, legal matters, heritage, research, record keeping, genealogy, and more.

However people live in specific regional locations; they belong to specific cultural or language groups; they have particular interests such as history, ensuring good governance and transparency in government or promoting human rights and many more. It is important to decide **which stakeholders you will prioritize in your Advocacy Plan** to help achieve your objectives and make the best use of the resources available to you. Those **resources** consist of people, time, effort and money.



Writing an Advocacy Plan and developing awareness

2. Target markets

There are several factors involved in advocacy and communication. Your **target markets are also called listeners and receivers.**

These are **four key characteristics** of communication:

1. Communication is characterized by information transfer,
2. Processing takes place in communication systems,
3. Both the sender and the receiver are actively involved in a communication system, and
4. The quality of communications varies (source: Losee, 1999)



Writing an Advocacy Plan and developing awareness

2. Target markets

There is much more to successful advocacy than just providing information, whether by speaking, by visual presentations or printed posters and publications.

“It’s not what our message does to the listener, but **what the listener does with our message**, that determines our success as communicators.” (Source: Hugh Mackay, *10 Laws of Human communication*, in “Why Don’t People Listen?”)

This statement draws on Losee’s first and third characteristics of communication, set out above. That is, communication requires both **a sender and a receiver**: without the active participation of both a communicator and a listener (or receiver), information transfer does not happen.



Writing an Advocacy Plan and developing awareness

2. Target markets

“It is very easy to cling to the idea that messages are powerful and audiences are passive. ... But a message (even if it is repeated) does not ensure that the audience has understood what you meant to convey. In fact for our communication to be considered successful, our audience must do something with our message. The **real power** is not embedded in the message, **it resides with the listener.**” (Brad Entwhistle)



Writing an Advocacy Plan and developing awareness

2. Target markets

What does this mean for us? **It means:**

- Know your audience when preparing an Advocacy Plan because you have to take your audience to a new place and a new understanding.
- Use market segmentation to analyze your stakeholder groups
- Network as much as possible

Once a decision has been made about which stakeholder groups will be the primary focus of your Advocacy Plan, the next step is to analyze those groups to gain an understanding of the composition of each group.



Writing an Advocacy Plan and developing awareness

2. Target markets for targeted communication

Market researchers use a technique known as market segmentation for this purpose. It can be defined as the process of splitting **customers into different groups**, or segments, within which customers with similar characteristics have similar needs.

Segmenting your market will help to make your Advocacy Plan more effective with appropriately **targeted communication activities**. It will also help you to decide how to make the best use of the resources at your disposal.

Examples:

If you write a Plan to increase your acquisitions, you will use communication activities of interest to your donors (most probably traditional media).

If you write a Plan to obtain practicum students, you will use communication activities of interest to a younger generation (most probably social media).



Writing an Advocacy Plan and developing awareness

2. Target markets

It is easier to get together and voice an opinion, than it is to fight a battle on your own.

Consequently it is essential to build and maintain a strong network both inside and outside our professional field (outside network includes politicians, the media, the general public and those in our sister professions).

Networking with people **can make a real impact**, especially when it comes to lobbying.

Example:

One of the reasons that the Universal Declaration on Archives came to the attention of UNESCO was because Papa Momar Diop, previously Senegal's National Archivist, was Senegal's Ambassador to UNESCO and was able to lobby for the UDA.



Writing an Advocacy Plan and developing awareness

3. A message for each target market

“Processing takes place in communication systems” (Losee’s second point).

Of course communication systems vary and the **message will be interpreted** in the light of how, when, and where and by whom it is said (Mackay’s 9th law).

To ensure that the advocacy message is both received and acted upon by listeners, it is important to

1. Use a language that is appropriate and easy for the audience to understand. This means a **message prepared for each target market**, even if the **general meaning** (ex.: We are the best!) **remains the same**
2. Use **multiple communication channels** to ensure the message is received and reinforced. For example, personal contact, public presentations, print, visual media and various social media channels could all be employed at various times to reinforce the same message.



Writing an Advocacy Plan and developing awareness

3. A message for each target market

3. Consider **when and where** the target audience will be most receptive to the message and prepare the message carefully.

Examples:

Prepare a message for each target market for special occasions (such as celebrations of anniversary of an archival institution or International Archives Day) and **include content based on your goals and objectives** (such as better awareness for your institution)

4. If you need a contact person on the Advocacy Plan: Choose a person perceived to be trustworthy and able to speak with accuracy and authoritatively. You might need a **contact person for each target market.**



Writing an Advocacy Plan and developing awareness

4. Outreach activities

Plan **outreach activities** for each target group.

It is a good idea to have separate specific activities for each audience even if the information in general remains the same.

The following are examples of **activities personalized** for three important audiences. You may have to develop new skills, however the following activities can be offered with a limited budget.

Writing an Advocacy Plan and developing awareness

4. Outreach activities (examples)

When **lobbying for awareness of** archives and records management (your general goal) to the **general public** or broad **communities** (your target market) your advocacy message may be made available through various outreach activities, such as:

- Print brochures explaining archives, records management and the profession and send them to identified groups, or place copies strategically at community venues.
- Speak at community forums. Develop a set of speaker notes and PowerPoint slides to support these presentations.
- Prepare feature articles and submit them to the media.
- Present seminars/workshops with specific broad community appeal.
- Develop information packages to distribute at community events and venues.
- Set up a portable promotional display unit to use at community events and venues.
- As appropriate, make submissions on broad community issues where archival and records management matters are relevant.



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4. Outreach activities (examples)

When lobbying for **awareness** of archives and records management (your general goal) to **businesses and other professional groups** (your target market) your advocacy message may be made available through various outreach activities, such as:

- Develop relationships with decision makers and individual professionals.
- Print a brochure explaining archives, records management and your services.
- Talk at other professions' conferences and other conferences that decision makers and individual professionals would attend.
- Place brochures about your services in other professions' conferences bags.
- Advertise by writing articles in the publications of businesses and other professional groups, or publications they would read, on how they should deal with their records and on how archives and records management could benefit them.
- Write letters inviting businesses and other professionals to use your services.
- Appoint a staff member (or a volunteer) as a liaison officer with businesses and other professionals to maintain and facilitate contact.



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4. Outreach activities (examples)

When lobbying for **awareness** of archives and records management (your general goal) to **students, academics, career counsellors** (your target market) your advocacy message may be made available through various outreach activities, such as:

- Meet with students, academics and career counsellors to discuss opportunities for a career in archives and records management.
- Print a brochure for students, academics and career counsellors explaining archives, records management and your services.
- Appoint a staff member (or a volunteer) as a liaison officer for students.
- Establish a mentoring scheme for students to encourage their interest.

In conclusion: **Your Advocacy Plan will include outreach activities, for special occasions, based on your goals and objectives and bringing the same meaning in personalized messages shaped for each target market.**



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

Using social media is a very common advocacy practice which is affordable to everyone with a limited budget. **It is part of any Advocacy Plan.**

Social media can be a very **effective** way of reaching a very wide audience, but achieving effective coverage while **avoiding pitfalls** requires a **strategy** that has been carefully and thoughtfully planned.

A few challenges:

- Messages on social media can easily become out of control.
- It is difficult to select the most effective vehicles.
- Be careful not to confuse institutional and personal social media accounts.



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

The social media landscape is continually **changing** and different social groups sometimes have varying social media **preferences**.

Do some **research** in order to select the most effective ways for reaching your priority target group or groups. Is it Facebook? Twitter? Instagram? WeChat? WhatsApp? YouTube? Or other social media apps that are popular in your country?

A 2017 news item on the ICA website reported the successful use of WeChat to promote International Archives Day by Renmin University of China. It doubled the number of Chinese citizens who had signed the UDA in the past years! Selecting WeChat was important to increase the number of signatures.



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

In addition, it is important to develop a **social media policy and strategies** which will be added to the Advocacy Plan.

Differences between a policy and a strategy:

- A strategy is a plan of action while a policy is a principle of action.
- Strategies are concentrated toward actions, whereas policies are decision oriented.
- Strategy is the best plan opted from a number of plans, in order to achieve the organizational goals and objectives. Policy is a set of common rules and regulations, which forms as a base to take decisions.

Policy and strategy are both used by organizations in decision-making. So educate your team about your social media policy and strategies.

When planning your social media campaign, check your organization's social media policy and be sure to **comply** with it.



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

If your organization does not already have a policy, the following three principles are a useful guide for developing a **social media policy**:

Representing: When posting on social media, employees should be clear at all times about what or whom they are representing.

Responsibility: Outline the circumstances in which an employee will be authorized to make reference to their employer on a social media site (e.g. with specific approval from management) and where the employee will be held responsible for any out-of-hours conduct.

Respect: Show respect for your employer, colleagues, clients and other individuals interacting with you.



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

Example of a strategy on using social media:

The ICA Advocacy Expert Group (AEG) provides an excellent and comprehensive Social Media Strategy, available in English, French and Spanish, that you can download and use. It demonstrates how to construct a social media strategy – you can either use it exactly as it is, or edit it to meet the special needs of your campaign.

The AEG Strategy is organized under the following headings:

- Goals
- Audience
- Strategy
- Impact and
- Examples of post content

It sets out ICA's preferred social media platforms and what to use them for, provides an example of segmenting the audience. sets out guidelines for managing posts and, very importantly, how to evaluate the effectiveness of the strategy.

Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

Here is an **example of the Social Media Strategy** taken from the ICA AEG page:

<https://www.ica.org/en/aeg-social-media-strategy> (accessed on February 11, 2021)

1. **Goals:** What do we want to accomplish?
Example: Promote awareness of archives in general; offer advocacy expertise when needed.
2. **Audience:** Who is this relevant to?
Example: Members of the public.
3. **Strategy:** How can we achieve this?
Example: By highlighting how archives engage with their stakeholders (communities, organizations, businesses, governments, users, etc) in different countries and contexts.



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

Example of the Social Media Strategy taken from the ICA AEG page:

4. **Impact:** Why does this matter?

Raising awareness of archives and the UDA will help those involved in the archival sector define their objectives on the one hand, and on the other hand will help shift the public image of archives from exclusive or intimidating to open and welcoming of different perspectives.

5. **Examples of post content**

Posts based on real life examples of:

- Projects which focus on widening participation and inclusiveness;
- Use of archives in political and social processes (reconciliation, human rights issues,...)
- Archives at risk and the impact of damaged or destroyed archives;
- Posts also showcasing archives as a profession (what makes it special?) and the importance of both ensuring preservation and providing access



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

Example of the Social Media Strategy taken from the ICA AEG page:

6. **Select social media platforms**

A. Facebook will be used to publish longer posts, covering the areas outlined above (short versions of opinion pieces, news articles, etc.).

Example of a Facebook publication:

“Archives can be instrumental in safeguarding human rights. A set of principles on the role of archivists in support of human rights states that ‘Archivists ensure that they select, acquire and retain historically and legally important materials without discrimination based on race, color, ethnic origin, gender, sexual preference, language, religion, political or other opinion, national or social origin, property, birth, economic or other status.’ This set of principles is still being developed and you can become part of the drafting process by submitting your opinion. To read more, go to <http:.....>” Contact information should be provided at the end of the publication.



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

Example of the Social Media Strategy taken from the ICA AEG page:

6. **Select social media platforms**

B. Twitter will be used to:

- Publicize Facebook posts;
- Engage in conversations with other users;
- Initiate online discussion.

Twitter is more suited to announcements and short thought-provoking statements. There should be a link between the two platforms (Facebook and Twitter) every time a post is published.

Example:

“Archivists can have an important role to play in safeguarding human rights. Join the debate on our Facebook page: [add hyperlink]”



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

Example of the Social Media Strategy taken from the ICA AEG page:

7. **Select guidelines for posts**

Frequency – Once a week?

The most important rule is that it is regular, preferably on the same day. We may decide to use Hootsuite (a social media management platform) to schedule posts. A schedule of posts should be prepared in advance, with anniversaries and special events scheduled in for the whole upcoming year; themes decided for the forthcoming month; and posts worded and ready to be published two weeks in advance. Additional posts can be published if there is any urgency.

Language – Informal but professional, using correct spelling and punctuation, and ensuring all hyperlinks and images work; inclusive, politically neutral but emotionally engaging.



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

Example of the Social Media Strategy taken from the ICA AEG page:

7. Select **Guidelines for posts**

Visual style – the same set of images should be used for both Facebook and Twitter (one for the profile picture and one for the headline) Use visual content as much as possible because there is a dramatic increase in interactions where visual content is present.

Nature of posts:

- Original as much as possible (rather than retweeting or sharing)
- Where possible, retweeting should be accompanied by own commentary which adds something to the content/puts it in the context relevant to your mission statement
- Retweeting posts from ICA partners' platforms can assist in developing a collaborative partnership
- Posts should be a collaborative effort
- Twitter and Facebook accounts will require regular monitoring in order to respond to comments, questions, etc., in a timely manner that is appropriate to your policies and guidelines



Writing an Advocacy Plan and developing awareness

5. Communication tools - **Social Media**

Example of the Social Media Strategy taken from the ICA AEG page:

8. **Evaluation**

The social media strategy should be reviewed periodically to ensure goals are being met and to discuss whether aspects of the plan need to be changed.

Evaluation procedures will take into account:

- The number of followers (as compared to the previous count)
- Number of interactions (broken down by type)
- Quality of interactions (details of discussions, comments, etc.)

Writing an Advocacy Plan and developing awareness

In conclusion, these are the sections your Advocacy Plan should include from general to specific:

Goals and objectives

Target markets

A message (such as better awareness) personalized for each target market

Various outreach activities, for each target market, based on the message

Communication tools and strategies on social media