

ALA American Library Association



The **Advocacy**
Action Plan
WORKBOOK

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Acknowledgments

This guide is a project of ALA's 2021–2022 [Committee on Library Advocacy](#) (COLA) and updates the 2009 Advocacy Action Workbook, developed by the American Library Association and United for Libraries.

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Before You Begin



This guide is designed to help you create an action plan for library advocacy on any issue.

It will help you focus on what you need to do, how you intend to get it done, and how to ensure that the timing is maximized for the best results. It will also help you document your efforts for evaluation and future planning. The activities contained in this guide are suggestions that can be shaped and adapted to your specific needs; the biggest step in advocacy is your first one—don't wait to get started!

STEP 1

Conduct a Community Analysis



Advocacy begins with listening. For library advocates, this requires ongoing engagement with the community, understanding the community’s needs and priorities, and examining how the work of the library connects to those priorities. Ultimately, advocating for libraries is about advocating for stronger communities. What does that mean for your advocacy?

1. **Describe your community**—geography, demographics, and defining characteristics.

2. Identify **key issues** facing your community.

3. Identify **trends** impacting the community and informing library service.

4. Where do the priorities of the community **intersect** with the work of the library?

There are several ways to collect information about your community. Here are some of them:

- **Community reference interviews.** Tapping into the librarian’s expertise in conducting interviews, these one-on-one conversations in the community center on identifying key issues facing the community, including those of imminent concern; and what success looks like for the interviewee.
- **Community audit.** A research approach that examines community priorities and assets, in order to leverage and build from a place of strength.
- **Community survey.** Customizable analysis that allows library to gather feedback from a large number of individuals and can be delivered in-person or virtually; surveys are often done in conjunction with strategic planning.

Undoubtedly, your association, consortium, institution, or library has already done some of this work. Other information sources can add to your understanding of the community:

- Strategic plans
- Community development plans
- School improvement plans
- Town hall meetings
- Community meetings
- Governance meetings
- Media (traditional and digital)

STEP 2

Build Your Team



Advocacy is a team sport, bringing together the perspectives and strengths of multiple players within and, perhaps, beyond your community for greater reach and impact. The team ensures that advocacy efforts are on track, tasks are delegated, and communication is ongoing.

Who is on your advocacy team?

Name	Representing [constituency]

Name	Representing [constituency]

As you establish your team, decide:

1. Who will serve as **chair or coordinator**?

2. Who will **recruit** additional members?

3. **When** will the group meet?

The composition of your team will vary depending on the type and scope of your project. Here are some stakeholder groups to consider for your team or one of its sub-groups:

- Other library types
- Educational institutions
- Friends, trustees, or board members
- Elected officials or their staff
- Author organizations, local authors/illustrators, local publishers and booksellers
- Other vendors
- Chamber of commerce and local businesses
- Civic groups
- Library users, parents, caregivers
- Community supporters

In projects large in scope or long-term, you may want to create task forces or subcommittees to help complete specific tasks. If this is the case, consider these questions as you plan your sub-groups:

- What should be the focus of each sub-group (e.g., communications, outreach, finance, evaluation)?
- How many volunteers are necessary for each sub-group?
- Who might be recruited?
- When should their work begin and when should it be completed?

Sub-groups

Sub-group	Chair/Primary contact

Additional Resources

Visit the resources available through [ALA's Ecosystem Initiative](#), including the [Ecosystem Continuum](#), to help build a strong team that leverages the entire library ecosystem.

STEP 3

Set Your Goals



What brings you to this workbook? Are you fighting a budget cut? Trying to maintain or increase a budget? Proposing a referendum or millage? Building a new library or addition? Advocating for state or national legislation?

Whatever your aim, the [Core Values of Librarianship](#) inform your professional practice as rooted in service to the community. Awareness of the core values of libraries in combination with the specific purpose of the advocacy campaign you are building here supports a strong collaboration among your team.

Once you have gathered the core members of your team, together you can set your goals. What are you trying to achieve? Whether you intend to improve awareness of library impacts on the community or to convince voters to support a bond issue, be as specific and focused as possible. Consider what you learned from your community analysis. How does that inform your goals?

Core Values of Librarianship



- **Access**
- **Confidentiality & Privacy**
- **Democracy**
- **Diversity**
- **Education**
- **Intellectual Freedom**
- **Preservation**
- **Professionalism**
- **The Public Good**
- **Service**
- **Social Responsibility**
- **Sustainability**

1. What are the **key issues** that inform this advocacy effort?

2. What is your **priority issue**?

3. **What does successful resolution of that issue look like?** Hopefully, your measures of success will be more than “We won!,” and will include details that point to ongoing advocacy that builds on this success.

4. What is your **GOAL**?

5. What **objectives or incremental steps** will help you reach that goal?

6. How will you **measure** progress along the way?

Additional Resources

Steps 1 & 2 of the ALA Ecosystem Initiative [Ecosystem Agenda Building Tool](#) ready you to narrow your focus to the one overarching goal to be achieved as the result of this advocacy effort. This tool may help you see how best to embed the intersecting needs of your stakeholders into a single goal.

STEP 4

Develop Your Message



Understanding your audience is critical to developing effective messages. Who are you trying to persuade—voters? Policy makers? The local business community? *Your audience may shift or expand during each stage of the process.*

1. **Name your primary audience.**

- Who makes the decision?

- Who influences this audience?

2. **Name your secondary audience(s)** [if applicable].

- Who makes the decision?

- Who influences this audience?

3. **Why does achieving your goal matter** to them and their constituencies?

What are the most important things you want others to know, delivered in terms that will resonate with your audience? These are your key messages. They should be consistent with your goal, connected with your audience’s priorities, and concisely expressed. These messages will be repeated in conversations, interviews, promotional materials, and presentations. They should be easy to remember.

Meet your audience where they are. Take the time to understand their perspectives. What do you want them to think? Feel? Do?

Key message(s)

1.

2.

3.

Tips for Telling an Effective Story

- Keep it simple, brief, and personal
- Center community impact
- Position library as solution
- Connect to the priorities of audience
- Incorporate key message
- Include a clear ask



Develop Your Talking Points

What data, examples, and stories support your key messages? Anticipate questions or comments and use the talking points to elaborate on your key messages. As you develop your talking points, be aware of your audience, their priorities, and how these talking points connect your messages to issues they care about. You may choose to emphasize certain talking points with specific audiences.

Talking points:

1. _____

2. _____

3. _____

4. _____

5. _____

Prepare

Work individually and with your team to practice delivering your key messages, packaged with talking points and supporting stories.

Additional Resources

Create an “elevator speech.” An [elevator speech](#) is a brief, persuasive speech that you can recite to convey your message in the amount of time an elevator ride takes, hence the name. Be prepared to make your case quickly and effectively!

STEP 5

Get Your Message Out



There are a wide variety of channels to use in getting your message out. Make sure that you are getting the right message to the right audience at the right time. This will mean prioritizing some of those channels over others and tapping into the different strengths and connections of your advocacy team to navigate them. Here are some of those avenues:

Traditional Media

Letters to the Editor: Everyone reads letters to the editor! So why not ensure that a pro-library letter slips in every now and then? A good way to “hook” library promotion into a letter to the editor is to respond to a big issue that the press is covering while showing how libraries can make a positive impact.

Op-Ed Pieces: It can be harder to get your local paper to print an Op-Ed piece. Here is what will help you get some excellent press coverage via this more in-depth citizen editorial:

- Have a well-known citizen write it.
- Tie into a major issue facing the community and show how the library helps (see “Letters to the Editor” above).
- Call the editor and talk to them about writing an Op-Ed piece and find out what issues they are interested in and how you can increase your chances for placement.

Radio: Develop radio spots for airing on local channels. Visit your local radio station and ask them if they would create some Public Service Announcements (PSAs) for the library as a contribution. If not, ask if they would do so at a discounted price. Visit with the radio

station and tell them about what the library has to offer and why it matters to everyone in the community. Ask the station to develop three or four spots using your message or slogan as a tagline. Finally, be sure the station is willing to air the spots.

Television: Pitch your story to a specific reporter who covers related issues. The key to a good story is showing how the library positively impacts the lives of people in the community. Large events may also be of interest. Make sure you have your spokespeople lined up and ready to tell their stories.

Another television avenue—and one that may be easier—is to get time on a local noon show or on public access television. Talk with your local station manager to see about being a guest on a local show.

Identify traditional media outlets to be engaged for this campaign. Consider:

- Outlet name
-

- Type of engagement
-

- Primary contact
-

- Spokesperson
-

Social Media

Facebook, Twitter, Linked-In, TikTok, Instagram, and other social media tools offer fast and efficient ways to disseminate information at an exponential rate. In some cases, advocacy communications are conveyed through an organization’s existing social media account, but sometimes



dedicated accounts are created around events or advocacy efforts. Know which channels are used by key stakeholder groups and audiences that you need to reach. Then:

- Build your social media communities organically by connecting and interacting with social media accounts from other libraries/library organizations, non-profits, education and cultural institutions, businesses, and government agencies in your area.
- Interact with your online communities by asking questions, replying to followers and similar organizations, and providing a space for people to engage with each other on various topics of relevant interest.
- Make sure the information you post is on message, accurate and without errors.
- For important or special announcements, you can pay to promote your post on some social media platforms. This can help you distribute your message widely across and beyond your online communities.
- Appoint a person to monitor your sites and communication. While the bulk of the feedback or comments received is generally positive, be aware that negative and inflammatory comments may arise and have a plan for handling them.
- Be sure to post follow-up information, such as the results of your campaign, photos from an event, and progress towards your goals with your advocacy effort.

Identify social media outlets to be engaged for this campaign. Consider:

- Outlet name
-

- Type of engagement
-

- Primary communicator
-

- Support, including graphics
-

Other Media



Website: Make it easy for supporters to know how they can help advance your advocacy goals by including specific and easily accessed information on the very front page of your site, if it is allowed by policy and law. Possible actions can include:

- Signing up as an advocate or taking action on a specific advocacy request (e.g., call your councilors, legislators, write the mayor).
- Volunteering for a committee or to help with the campaign—provide contact information.
- Writing a letter to the editor—give the newspaper’s address, along with “talking points” to help advocates make the case.
- Turning out to vote. Make sure your organization follows applicable elections laws.

Organization Newsletter: Your newsletter gives you the “power of the press” to communicate with stakeholders not just about news and events, but also advocacy priorities and their impact on the community. It also is an opportunity to reinforce the library’s or organization’s branding and key messages.

Direct Mail: Although expensive, there are times when direct mailings are a constructive way to reach your audience (e.g., during a referenda campaign).

Promotional Materials: Bookmarks, book bags, program flyers, membership renewals, direct mailings for membership drives—all of these materials are opportunities to get your message out. Be creative and consider other options as well:

- Leave branded bookmarks with your key messages at high traffic sites and places where people go and wait, such as doctors’ offices.
- Ask the local grocery store to put your message on their bags for a given length of time.
- Ask your utility company if you can include a bookmark or insert that contains information about your organization in a citywide mailing.
- Send a selected list of new business resources at the library to members of the Chamber of Commerce and be sure to include how the library benefits all businesses in your city.

Presentations: Nothing is more effective than personal contact. That’s the upside. The downside is that you can’t reach as many people at once with your message. You’ll need to create and train a cadre of volunteers—board members, volunteers, retirees, to get the message out in person.

Civic groups such as the Lions, Rotary, Kiwanis, etc. always welcome guest speakers. Your volunteers may belong to other clubs and organizations as well. Make a list of all the opportunities there are in your community, prioritize them, and begin scheduling speaking engagements to get your message out. Remember to “know your audience.” Make sure when you talk about the importance of the library and its services, you are tailoring your comments to what is of interest to your audience. If you are talking to physicians, for example, talk about the link between health and literacy and all that the library does to support literacy.

Strategize

Consider the following when deciding which strategies to use:

1. **Who** is your audience?

2. **What** is the best way to convey the information to the target audience? What kind of image do you want to project? Will it be an effective part of your total communication effort?

3. **When** is the deadline? Will your message be distributed in time to be effective?

4. **How** much will it cost? Is this the most effective use of available funds?

5. **Why** is this the best strategy for this audience?

Resources Checklist

How will you deliver your message? What tools (brochures, fact sheets, etc.) will you need to help build your case?

- Infographics and print materials
 - Print or digital advertisements
 - Sample letter to the editor or Op-Ed
 - Graphics and copy for social media
 - Video content
 - Public Service Announcements (PSAs)
 - Other (list here):
-



Create a table to track communications:

Target Audience	Communication channel/tool	Responsibility	Timeline
<i>e.g. voters over age 65</i>	<i>Traditional media/ Op-Ed in local paper</i>	<i>Volunteer A</i>	<i>draft finalized by February 25; placement March 15–March 31</i>

STEP 6

Put It All Together



By this point, you have identified:

- Community priorities
- Advocacy team members and sub-groups
- Metrics for success
- Target audience(s)
- Key messages
- Talking points
- Messaging strategies

Be prepared to move quickly and pivot as needs arise.

Create a timeline for your campaign:

Activity	Volunteers Involved	Start Date	End Date

Activity	Volunteers Involved	Start Date	End Date

Additional Resources

You can build a more detailed timeline using the [advocacy planning matrix](#). Also visit the example available in the [year-round advocacy checklist](#).

STEP 7

Continue Your Advocacy



While this workbook will help you plan a campaign around a specific goal, library advocacy is an ongoing process that requires long-term commitment, attention, and effort. The needs of libraries and communities change over time, and library stakeholders change as well, so it's best to envision advocacy as a cycle.

Advocacy for the Long Haul

- **Get to know your decision makers and elected officials** (local, regional, state and national representatives). Build and keep your relationships with them by attending their meetings, town halls, and events, as well as inviting them to your own events and meetings. Make sure to maintain the relationships throughout the good times and the difficult times; do not befriend them only when you need them. These partnerships are a two-way street, so you should also consider what libraries can do for your decision makers and elected officials as you continue your advocacy efforts with them.
- **Join other advocacy groups**—other library advocates, arts groups, literacy groups, education advocates, and work to promote each other's goals and issues. Chambers of commerce and business alliances often have committees that advocate for everyone to the legislature. Check local policies and state laws and, where you're able to do so, join forces with others to advocate collaboratively.
- **Join with non-profits and other government agencies** (senior centers, recreation centers, animal shelters). Work together to help everyone achieve their goals.
- **Advocacy is a long game.** Always maintain constructive relationships with decision makers and be in the process of recruiting and preparing your successors.

Cycle

- Learn the election and legislative cycles for all the groups who make law or policy for your organization. **Do not wait until the legislative session starts.** Legislators and policy makers are extremely busy at this point and you need to have made your case before bills are introduced so that all you have to do is send short reminders or points to consider. Before your issues come up they should know you and your issues well.
- Remember that all legislators and policy makers have aides who do most of the research and work. Get to know them and help them understand your issues or requests and why you are asking for certain things. Make them an ally so when the legislator needs reminding on how to vote they can help direct them.

Evaluation

Annually (or semi-annually) evaluate your advocacy efforts to see what could improve.

1. Did you get what you needed?

2. Was progress made?

3. Do you have new supporters?

4. Was the amount of time and effort expended worth the result?

5. What do you need to change? What should be continued?

6. Is anything missing?

7. Do you need to adjust target audiences?

Maintain Relationships

- **Keep in contact** with your groups, legislators and policy makers. Don't be a fair weather partner or constituent, and remember to say thank you.
- **Volunteer** to help other organizations in their efforts, and show them that the library building and holdings are not the only resources on offer—the people who represent the library are equally as valuable and beneficial to the community.
- **Invite partners** to celebrate and plan together. Make sure to support work on their priorities as well.
- **Thank advocates** for their efforts with a shout out on social media or a note or email.
- **Keep aware of your stakeholders**—local, regional, state and national—so you can anticipate or be aware of future issues and opportunities.
- **Don't bury your head in the sand.** Be a complete and participating advocacy partner.

APPENDIX 1

Guide the Conversation: Bridge, Hook and Flag

These are three techniques for guiding a conversation so that you are sure to get the main point or points that you want to be remembered across to your target audiences.

Bridge. This technique will allow you to move from an area in the conversation that you don't want to discuss or that has the potential to sidetrack the issue and get the conversation back to your message. If the legislator says, for example, "Why shouldn't we be supporting a policy that will help software companies? Isn't a good economy good for libraries?" Rather than getting into a discussion about the economy and whether or not new legislation will help the economy overall, you can use this as a platform for your point by saying: "I think the real question is," and go back to your main point. For example, "I think the real question is "doesn't everyone benefit from good consumer laws?" Then, answer that question!



Hook. This is a technique that can lead your listener to follow up on your first point, allowing you to get a second point in. For example, you can say, "There are two crucial considerations that need to be taken into account before you support this proposed policy. The first is," then expand on that point. Likely, the legislator or staff person will then ask you (or allow you) to follow up with the second point. This keeps the conversational ball in your court longer and gives you the opportunity to make both (or all) points.

Flag. This technique is the easiest, and most people use it unconsciously all the time. Flagging alerts your listeners to what you consider most important. It's an excellent way to emphasize the key point or points you want the audience to remember. Flagging is simply giving your audience a verbal clue about what is essential: "The most important thing to remember is . . ." or "If you remember nothing else, please remember these two points . . ."



APPENDIX 2

Checklist for Library Advocates



- Stay informed about national issues: follow ALA; International City/County Mgmt Association (ICMA); National League of Cities (NLC); National Association of Counties (NACO), etc.
- Stay informed about state issues: follow your state library association; state municipal or county associations, particularly for legislative/policy issues.
- Stay informed about local issues: follow library ecosystem partners; local press; community-based organizations; local events; staff expertise.
- Get to know your federal legislators—visit their websites, determine which committees they sit on, examine their priorities, look at their voting record, think about how your priorities for libraries dovetail with their expressed priorities/voting record.
- Get to know your state legislators—visit their websites, determine which committees they sit on, examine their priorities, look at their voting record, think about how your priorities for libraries dovetail with their expressed priorities/voting record.
- Get to know officials at key state agencies whose work intersects with libraries.
- Get to know your local elected officials—attend their events, learn their priorities, follow them on social media, look at their voting record, think about how your priorities for libraries dovetail with their expressed priorities/voting record.
- Contact your state/federal legislators when your state library association or ALA asks you to reach out to them on a specific issue.
- Keep your legislators informed about library/community happenings through an email once a month/quarter that highlights events that dovetail with that legislator’s area(s) of interest.

- Invite your elected officials to a library event. If they are not invited, they definitely won't come.
- If your state library association holds an annual legislative day, attend that and network with others that share your passion for advocacy.
- Create and distribute some written 1-pagers that reflect your library's community impact (and that can be tweaked annually so that you have visually appealing handouts that aren't reinvented every year).
- Hold an event around a nationwide initiative such as National Library Week. See ALA's list of celebrations and events for other ideas: ala.org/conferencesevents/celebrationweeks.
- Hone your library story and talk to others informally about why you love libraries.
- Develop an elevator speech about libraries in general or about a specific issue facing your library/community now. Practice with friends and then use it when out and about!
- Develop and share an elevator speech about your library with a group (such as Friends or Trustees), keeping the message consistent and emphasizing that importance to those who want to help spread the word.
- Talk or write more formally about a specific community issue and its relationship to the library, or find others who feel passionately like you do and harness their support to write/speak (Community e-newsletter? Radio? TV? Newspaper? Letter to the editor? Op-Ed?)
- Offer to speak to community organizations about how the library is a community resource for them (Rotary? Lions Club? Elks Club? Garden Club? Chamber of Commerce? PTA? School Board?)
- Build relationships with key community stakeholders. This is a long-term effort that requires consistent work year-round. Don't just reach out because you want something from them at that moment. Reach out to listen to their ideas and perspectives—it will inform how you continue to advocate for the library.
- Develop and share your advocacy contact list. (See Appendix 3.)

APPENDIX 3

Advocacy Contact List



Constructive working relationships with stakeholders and decision makers is foundational to your advocacy work.

Keep track of the names/websites/emails/phone numbers for the key contacts that you may need to include in advocacy efforts. Tip: update this list annually to keep it current!

Federal

Senators		
Staff contact		
Key committees		
Representative(s)		
Staff contact		
Key committees		
Agency contacts		

State

Senators		
Staff contact		
Key committees		
Representative(s)		
Staff contact		
Key committees		
Agency contacts		

Local

County commissioner(s)	
City manager/mayor	
City councilors	
County clerk	
Other county/city personnel	

Community

Chamber of commerce	
Workforce development organizations	
Education/cultural institutions	
Civic groups	
Other	

Media

Newspaper staff	
Radio/TV station staff	
Online community facilitator	
Other local media	
Other	

Other Library-Related Groups

State library association	
State library	
Statewide trustee organization	
School library organization	
Academic library association	
School superintendents/ school boards associations	
Teachers union/association	
Other	

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