


ADVOCACY



ica / SPA

international council on archives
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ADVOCACY WORKS!

In 2006 ICA's Section of Professional Associations (SPA) issued guidelines covering advocacy and promotion activities for associations of archivists and record managers. This brochure complements these guidelines. It starts with advocacy advice for the individual archivist and records manager and is followed by suggestions for advocacy by associations. It includes the promotion by associations of the Universal Declaration on Archives (UDA) that was adopted by ICA in Oslo in September 2010 and endorsed by UNESCO in Paris in November 2011. The UDA is a central pillar of the ICA's advocacy program.

Golden Rules of Advocacy

Do:

- Be proud and assertive
- Seize opportunities for promotion
- Show patience and flexibility with the public
- Use plain language
- Have a clear message
- Use the media
- Define your audience
- Think of others as partners
- Define one goal at a time
- Remain professional but use humor
- Recruit assistance from allied professions
- Tell what you have to offer to users
- Offer your help to the public

Don't:

- Apologize or be hesitant
- Lose opportunities, such as anniversaries
- Show impatience and inflexibility
- Use professional jargon
- Confuse the public with too much information
- Recreate what is already available
- Use the same message for everyone
- Be too ambitious
- Take yourself too seriously
- Separate yourself from possible allies
- Think only of the preservation and conservation of records



An Elevator Pitch: a perfect way to advocate for the profession _____

Everybody has experienced attending a party or been in a social setting where people have asked: “What do you do?” What’s been your answer? Perhaps your response didn’t really get to the point. If this is the case then it would be good to work on one or more elevator pitches.

An elevator pitch is a way of presenting something in 30 seconds to 2 minutes, lasting no longer than the length of an average elevator ride. The term was first used in 1995 and applied originally to the world of business. Today elevator pitches are common in every field, including archives and records management.

In an elevator pitch you go straight to the point with the aim of providing the most information in the minimum amount of time. The speech is not only about facts but is also about emotions. It should focus on a unique selling point and must be adapted to suit your audience. Beware of professional jargon and acronyms. Don't include too much information; don't talk too fast, nor too slow and make eye contact. It is recommended to have several pitches ready to respond to different circumstances.

An effective elevator pitch answers six questions:

1. Who are you?
2. What do you do?
3. What services do you offer?
4. Whom do you do it for?
5. Why you make a difference?
6. What's in it for them?

Rehearse your pitch; practice it in front of friends. Your speech has to be fluent; it has to become routine. However, routine does not mean you cannot or should not change your pitch. Always keep improving it. Your elevator pitch is successful if the person to whom you are talking says: "Tell me more!"

Hands on examples

The SPA Board had its 2014 spring meeting in Boston, USA. Before the meeting members attended a conference where the elevator pitch was a topic at one of the sessions. Four people working in archives/records management spoke about how they prepared their pitches and delivered samples of their presentations. Their advice included:

- You need to prepare and rehearse your pitch before you deliver it. In practicing you need to free yourself from the script, otherwise the pitch may come across as flat and too rehearsed.
- Adjust your pitch to your audience. The same pitch should not be used everywhere and to everyone. Think about roles and level of management, responsibilities, skills and the knowledge of your audience.

- Don't focus on too many details. Example: A doctor asked to explain his or her work will not give a long description about writing medical case summaries, analyzing test results and studying X-rays. The response will be: "I save lives!"
- Find and use good one-liners. Example: "What does an archivist do?" "I protect human rights!"
- Use humor and keep it real.
- Don't babble and overwhelm people with information losing your main message.
- Don't make it too short and fact-like, your message won't come across.
- Relate your pitch to the other person's field of interest or expertise. Example: Pitching to a physicist an archivist/ records manager could say, "You know all those research reports you use in your work and those you produce yourself, I record them in our electronic system and add descriptive data so that they are easily found when needed again".
- Appeal to people's vanity. Example: "I'm an archivist, and I can ensure your immortality!"

Online article:

Blog Entry 6: Elevator Speech, Aliza Leventhal, 2013, SAA Issues and Advocacy Roundtable:

<http://www2.archivists.org/groups/issues-and-advocacy-roundtable/blog-entry-6-elevator-speech>

Some examples:

<http://lists.ufl.edu/cgi-bin/wa?A2=recmgmt-l;DeqfRw;20061215104037-0800c>

<http://ischooligans.wordpress.com/2013/02/21/what-is-an-archivist/>

"Your Perfect Pitch: Elevator Speeches from the Field," Archival Outlook, Nora Murphy, January/February 2014:

<http://www.bluetoad.com/publication/?i=194486>

How to Get Media Attention? ---

Getting media attention may be challenging, but not impossible, and is rewarding when it happens. Archival and records management issues do not attract much media attention and as a consequence are not high on the agendas of politicians and stakeholders. We should remember that, although we know what an important job archivists and records managers do we need to convey this to the rest of the world. We cannot wait for the world to come to us, we need to act proactively focusing on the importance of our work in protecting human rights, supporting accountable and transparent administration, protecting memories, and highlighting our profession's relevance in today's digital society. Establishing a partnership with the media will be

highly advantageous in assisting efforts to spread our professional message. The relationship will also be advantageous for the media who, although they might not always be aware, are dependent on us doing a good job so they can gather reliable evidence to support their reporting activities.

As communication is not necessarily one of our strengths, the following advice may assist in efforts to publicize the importance of what we do.

Find a Relevant Topic _____

Use current issues in the media, preferably ones that are already being circulated in different media outlets that have a clear archives /records management side to them. For example, in Norway, as in many other countries, the government wants to be perceived as being open and accessible to the public, while at the same time focusing on improving and modernizing the public sector by getting rid of “old-fashioned and time-consuming work methods”. The implication is: get rid of paper and offer online services 24/7. To those outside our sector, achieving this goal just relates to information technology (IT) issues to be solved by IT people. We know, however, that IT people will focus on IT, and probably not consider archival and records management aspects. To ensure that documentation created in delivering digital solutions is handled correctly and accordingly to our standards, we, as archivists and records managers, need to become involved at the outset, contributing our expertise and identifying our requirements. It is our responsibility to fill in the knowledge gaps by promoting our competencies to governmental agencies, other authorities and stakeholders. We can, and must, use the media to do so.

Appeal to the Individual _____

The more concrete and personal you write the text, the better. People are more likely to become engaged in an issue if it appeals directly to them, and is easily relatable. Since our field of expertise is not one that people generally discuss it is important to find a personal angle. From ancient times pathos has been used as a communication technique in rhetoric. Appealing to the audience’s emotions could also be an effective way to obtain insight and understanding when it comes to archives and

records management issues. However, it is important not to overestimate people's knowledge of archives and records management, at the same time as not to underestimate their intellect. Saying just the right amount, in the right kind of language, leaving out all unnecessary details, while telling a story that is personal and relatable, is an art, but it can be done.

This point can be illustrated by using a current example from Norway. Two years ago, a woman was killed by her ex-husband. Leading up to the murder, the woman had sought refuge at a women's shelter on several occasions. The family asked for the woman's file from the shelter to find out whether or not the shelter could be held responsible for not giving her the right protection. The shelter claimed that it had no obligation to keep the file but rather they were obliged to delete it when the client died, referring to the Norwegian Privacy Act. The case received significant publicity, but not from an archival and records management point of view. In reality, this case is about the core professional issues of appraisal and the everlasting controversy between the right to be remembered and the right to be forgotten. Even though this case is tragic it could be used to illustrate the importance of good governance; getting that point across is easier when a case is already being widely discussed in media.

Write the Text

Story-telling is essential and writing the text in a journalistic style, starting off with something "tabloid" or attention grabbing and continuing on with the conclusion instead of using the traditional way of saving the answer until the end, might be a good approach. Remember that you are trying to sell an issue, and will be competing with lots of other content that might seem more saleable at first glance.

You need to keep it simple focusing on just one thing you want to say. Do not use shoptalk or jargon. As archivists and records managers we are by nature concerned with details and getting things right, but in dealing with the media it is important to focus on the main issue and build your text solely around that, even if it means abandoning your pet topics or not being able to include all the facts.

Do not be afraid of being bold and sometimes even a little mean. Not mean to other individuals, of course, but we can all benefit from distancing ourselves from the myth of the quiet and reluctant archivist and records manager and stand out as someone with an attitude and passion. We certainly have lots of reasons to justify such a behavior. Also, using humor is another approach although there is a thin line between using just the right amount of humor and being perceived as not being serious enough.

Once you have finished writing your text, try it out on someone who is not in the archives/records management field. They will be able to tell you whether you have managed to de-professionalize the text making it easy to read and understandable to a lay person. The ultimate test would be to let a journalist, if you know one, read your text before you send it out into the media world.

The Bigger Picture _____

You have to be patient and, first and foremost, persistent. You might get rejected many times but do not give up. When your text is accepted and published, do not get too disappointed if your issue still fails to get the attention it should. It takes time to build up a reputation and to brand archives and records management. A good motivator is to celebrate every little victory along the way.

Also, remember to think locally. Getting the attention of the media in your own region is usually easier.

We need to take control, be active and take a stand for our profession. Remember, the media will not come to us, we should seize every opportunity.

How to advocate to politicians, governments and other stakeholders _____

Advice on how to deal with the media also applies when talking to politicians, governments and other stakeholders.

When lobbying for archives and records management we need to:

- Find a relevant topic (always exploit what's topical and current).
- Stay focused on one topic and leave out all unnecessary facts and details.

- Define your audience and adjust your dialogue accordingly.
- Appeal to the individual.
- Use relatable and concrete examples.
- Stay away from jargon and shoptalk.
- Never overestimate your audience's existing knowledge about archives and records management issues, but keep in mind that this does not mean you should underestimate their intellect.
- Be true and honest.
- Use humor if it feels right and it comes naturally.
- Be assertive and bold, step outside your comfort zone if needed, remember you have a good case to present.
- Use their language and always relate your business to theirs.

Stay Informed _____

As a lot of government agencies and other authorities are keen on being perceived as open and accessible, it is a really good idea to check out their websites on a regular basis and sign up for newsletters if they offer them. This way, you know what is going on and when you need to raise your professional voice. As with the media, do not expect to be asked for an opinion, it does not matter how relevant the issue is to our work, we need to ask the questions.

Network _____

Within our professions there are a lot of knowledgeable and enthusiastic people which we need to take advantage of, and be more conscious of, when it comes to networking. It is easier to get together and voice an opinion, than it is to fight a battle on your own.

Also, networking with people outside our profession can make a real impact, especially when it comes to lobbying. If we get together with IT or legal professionals to support archival and records management issues it might be easier to get more publicity.

How associations can advocate to the general public or broad communities, businesses and professionals, students, academics and career counsellors —

This is a list of suggested activities for an association to reach out in communities. 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.

When lobbying for archives and records management to the general public or broad communities:

- Publish 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.
- Publicize association events to a wider community audience, where they have a relevance to a broad audience.
- 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.
- Establish a website for the association.

When lobbying for archives and records management to businesses and other professional groups and their members:

- Develop relationships with decision makers and individual professionals.
- Publish a brochure explaining archives, records management and the association.
- Talk at other professions' conferences and other conferences that decision makers and individual professionals would attend.
- Place brochures about the association in other professions' conferences satchels.

- Advertise and write 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 join the association.
- Appoint an association member as a liaison officer with businesses and other professionals to maintain and facilitate contact.

When lobbying for archives and records management to students, academics, career counsellors:

- Meet with students, academics and career counsellors to discuss opportunities for a career in archives and records management.
- Publish a brochure for students, academics and career counsellors explaining archives, records management and the association.
- Address student groups.
- Appoint an association member as a liaison officer for students wanting more information on the profession.
- Establish a mentoring scheme for students to encourage interest in the profession and the association.
- Place information about following a career in archives and records management on the association's website.

How to endorse and promote the Universal Declaration on Archives: The example of Catalonia

Since UNESCO's adoption of the Universal Declaration on Archives (UDA) in 2011, few legislative bodies have incorporated the Declaration into their laws. It has been three years, and it may be the right time for both the ICA and professional groups that belong to the Section of Professional Associations (SPA) to start a more robust campaign for its wider adoption. To support this objective, the Archivists-Records Managers Association of Catalonia (AAC) has prepared the following summary about the strategies used to promote the principles of the UDA and to encourage public institutions to start adopting it.

The steps undertaken to promote the UDA require constant follow-up: one-off endorsements are not enough. The Catalonian association believes that promotion of the UDA should be a constant process of dissemination, explanation, understanding, and encouragement of values we defend as professionals and that we firmly believe flow from the good management of the documentation produced in our societies. The following is a short list of initiatives that can be pursued and which, in Catalonia, are gradually yielding results. These are the steps suggested:

1. Adoption by the professional association. The first initiative is clearly to promote adoption by the association itself. A short declaration by the association's board of management followed by an announcement to all members is essential first steps. Explaining the values and goals of the UDA to members is a requirement to promote the spread of its principles.

2. Promote the adoption of individual professionals. As soon as UNESCO endorsed the Declaration the ICA took the initiative to set up an official register of individual signatories supporting the UDA, which has attracted more than 3,000 supporters since it first went live. Considering how many archivists there are, the number of signatories so far is obviously smaller than it should be. Therefore, if associations encourage individual adoption, this register could be used to strengthen the professional consensus among archivists and records managers. Individual adoption is not limited to professionals in our field but is open to the public. However, to achieve good representation we should first agree, as a professional community, to add our names to this register.

Here is a link to the ICA's official register:

<https://icarchives.wufoo.com/forms/register-your-support-for-the-uda/>.

3. Add a UDA section to the association's website. It may be useful for the professional association's corporate website to devote a section to providing comprehensive information about the UDA, the reasons behind it, its goals, history, and how it can be adopted, by both individuals and organizations. It is also important to have a register of the institutions in the professional association's geographic range that have adopted the UDA. This should remain a permanent section of the site, which all professionals can access for detailed information about the UDA, presented in

whatever language they will best understand. Most of the information is, of course, available on the ICA website but having it on the association's own site would make the message more accessible.

For example, see the #UDA Section of the AAC's site, and the Institutional Register that has been set up: <http://arxiv.org/abs/1008.1000>

4. Create a UDA Kit. Ideally, the UDA section of the association's website could include downloads so professionals who want to encourage adoption by a particular organization will have examples and forms tailored to their needs that simplify the task of writing the compulsory reports. Sometimes, laziness at the prospect of writing such reports from scratch slows down a process that does not have to be slow. Encouraging an institution to adopt the UDA does not require particularly complex steps, but sometimes the problem is clearly not the association's management capacity but rather that of the organization it is encouraging to adopt it.

Here, for example, is the AAC's UDA Kit: <http://arxiv.org/abs/1008.1000>

5. Adoption by the legislature of the geographic area covered by the professional association. Once the UDA has been promoted within the professional community, it is a good idea to promote its adoption by whatever legislative body the association deems most appropriate. The UDA is a broad, universal declaration, on a par with other great moral, ethical, and social principles that can be adopted around the world. The general nature of these principles means that a legislature, regulatory agency, or standards-generating institution is the most suitable context for initial adoption. It is suggested that a minimum of three documents are needed to initiate the process:

- a) An introductory letter from the association, addressed to the speaker or chairperson of the legislature.
- b) A request to adopt the UDA, explaining why the request is being made, while taking the opportunity to present the association's credentials, capabilities and skills, and its experience in encouraging specific legislation and in promoting the profession.
- c) The adoption proposal itself, consisting of a summary of the request, the text of the UDA, and a list of items to take it beyond the UDA and its principles, to inclu-

de other initiatives the requesting organization means to pursue. Needless to say, the UDA is a fine opportunity to promote the profession, but the Declaration by itself accomplishes nothing.

6. Adoption by public bodies in the professional association's geographic area. Once the legislature endorses the UDA, it is time to encourage adoption by all public bodies with management authority in the geographic area served by the professional organization. This is not a short term task, and requires detailed follow-up by the association, which should position the UDA adoption requests within the framework of specific strategies the association has laid out.

7. Adoption by private organizations in the professional association's geographic area. The same applies to promoting adoption within the corporate world. Though they may seem far removed from the need to embrace such a declaration, adoption of the UDA by private businesses can become a very good indicator of the health of a democracy and of the business community's involvement. As noted above, the decision to pursue adoption by a specific institution depends on the requesting association's strategies.

8. Create a network. As we have seen, disseminating the UDA is an excellent way to approach public and private entities that might otherwise be beyond our reach. The text of the Declaration can be adopted by any organization that aims to be a model entity and promotes socially relevant principles in its policies. Additionally, any private business that hopes to improve its management systems and promote a transparent external image may endorse the UDA as matter of prestige. After the UDA has been promoted and adopted, the adopting organization should publicize the fact to its network of contacts. The organization should announce the formal endorsement to its networks, which in turn can begin weaving a tight web of contacts. Thus, the task begun by the association can filter out into the fabric of its region's organizations and businesses.

