Advocating for Change

A Research4Life Advocacy Toolkit for Librarians

OCTOBER 2018

research4life

Introduction

To enhance visibility and get the message out to larger communities about what the modern library is and does, librarians are increasingly acting as advocates for their resources and services. This work may range from small efforts to, for example, educate library users about how to use e-resources, or even large campaigns to get financial support in order to keep a library running.

Advocacy is an effective way not only to deliver the library message to a wider audience but also to help librarians become part of larger organizational, local, regional, or national conversations. Moreover, **advocacy gets the information professional out of the library and into the community** where services and resources can be promoted and marketed and where partners, stakeholders and supporters can be found.

Successful advocacy is critical to public libraries' ability to address the needs of their community. Public libraries must advocate for funding and supportive policies to grow and sustain important services that meet evolving community needs. Training library staff how to advocate is vital in libraries' efforts to convince governments to change policies and commit sustained funding.[1]

Many librarians and information professionals in the developing world do not have the means or tools to develop effective advocacy strategies within their institutions. In order to support and encourage information professionals and interested organizations in emerging countries to engage in advocacy, Research4Life has developed **The Research4Life Advocacy Toolkit**, a practical learning tool that provides a range of resources to get effectively support from decision makers, administration or management to support the academic library and promote Research4Life and its programmes.

Through practical examples, this toolkit presents six steps to develop a successful and structured advocacy strategy focusing specifically on case studies and experiences from librarians in developing countries. It provides case studies of successful efforts from Research4life users and hands-on material that will facilitate the implementation of activities that can help obtain support to foster the usage of the Research4Life programmes - Hinari, AGORA, OARE, ARDI and GOALI.

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[1] Sawaya *et.al.* 2009.

1. Some definitions

What is advocacy?

While the Cambridge Dictionary defines advocacy as *"public support of an idea, plan, or way of doing something"*[2], we would like to provide a definition which fits the areas where Research4Life users are working in. The following definition is an adaption of a definition provided by UNICEF:

> *"Advocacy is the deliberate process, based on demonstrated evidence, to directly and indirectly influence decision makers, stakeholders and relevant audiences to support and implement actions that contribute to an enhanced access to scientific knowledge.***"**[3]

When applied to the library context, advocacy can take further definitions:

> *"Advocacy is the on-going process of building partnerships so that others will act for and with you, turning passive support into educated action for the library media program."*[4]

> *"Advocacy is a planned, deliberate, sustained effort to raise awareness of an issue. It's an ongoing process in which support and understanding are built incrementally over an extended period of time."*[5]

So the core of an advocacy initiative is to get stakeholders to understand how the library can and does contribute to information access and use, and to then increase their engagement and support to libraries for the benefit of all.

It can be difficult to get the message across, but it is important. It may, in fact, *"might be the single most important thing that librarians do in their professional lifetime"*.[6]

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[2] Cambridge Dictionary: advocacy: https://dictionary.cambridge.org/dictionary/english/advocacy, accessed: June 2018.

[3] UNICEF (2010). Advocacy Toolkit

[4] American Association of School Librarians (2005)

[5] Canadian Association of Public Libraries (2001)

[6] Welburn *et.al.* 2010

Types of advocacy

There are different types of efforts for advocacy. Here are some examples:

➜ Collecting evidence: Gathering data about your library or conducting surveys
➜ Attending professional development: Following a course or training
➜ Being a member of association or task force
➜ Communicating with decision makers
➜ Reading/distributing information on school library advocacy
➜ Attending conferences and making presentations
➜ Collaborating and networking with other librarians

You can engage in one or multiple efforts. However, independent of the advocacy effort or strategy you choose to follow, it is important that you do it in a planned manner with specific goals, objectives and tools. You need to set up a timeline and assess the resources you have and will need.

This toolkit describes how you can develop an advocacy strategy in five steps and provides some tools for implementing your advocacy strategy.

Activity 1. Can you identify and list other types of advocacy efforts?

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2. Advocating for Research4Life: Understanding the Partnership

Before planning your advocacy strategy it is important that you fully understand the capabilities and resources your library provides. If your library or organization provides the Research4Life resources (journals, training material or e-books) you should get to know what the partnership is about.

Tip: Visit the Research4Life Training portal and click on "About Research4Life" module. In this section watch the webinar and the "Discover Research4Life" video to learn more.

What is Research4Life?

Research4Life is the collective name for the five programmes – Hinari, AGORA, OARE, ARDI and GOALI– that provide developing countries with free or low cost access to academic and professional peer-reviewed content online.

Scientific research is the basis for innovation and development. It builds on scientific literature and lives from the exchange of knowledge. Even though more and more knowledge is shared through Open Access journals and repositories, modern science still depends on the access to journals that have to be purchased and institutions in developing countries often lack of funding to do that. Through the Research4Life partnership, prominent publishers such as Elsevier, Springer, Wiley, Taylor and Francis, SAGE, Wolters Kluwer, Oxford University Press, BioOne, Cambridge University Press, Brill, Karger, the American Psychological Association and many others, enable not-for-profit national academic, research or government institutions to access these scientific peer-reviewed journals for free or at very low cost. In this way, Research4Life aims to close the knowledge gap between developing and industrialized countries.

What are the benefits of Research4Life?

- Online access to thousands of peer-reviewed international scientific journals, books, and databases
- Full-text articles which can be downloaded for saving, printing or reading on screen
- Searching by keyword, subject, author or language
- Resources available in several languages
- Training in information literacy and promotional support

Research4Life provides its service to eligible institutions in two categories of countries: Countries in Group A get free access to the Research4Life collections while countries in Group B have to pay a fee of 1,500 USD per annum. The country categories are based on four factors: Total GNI (World Bank figures), GNI per capita (World Bank figures), United Nations Least Developed Country (LDCs) List and Human Development Index (HDI). Learn more about the eligibility criteria.

Users in institutions that are not subscribed to Research4Life or that have not paid the annual fee, can still access the peer reviewed Open Access contents on the five programmatic platforms. Training and usage of Research4Life is worthwhile in any case.

Activity 2. What can your library offer? Make a list of the available e-resources and describe the benefits of each.

3. Developing an advocacy strategy

This section presents five steps that you can follow to develop your advocacy strategy. You do not have to follow them in sequence. You can also choose which steps you would like to focus on, depending on your existing level of planning. However, try to implement them all in your final strategy and use the available resources mentioned.

The five steps are meant to provide you with a guideline of how to plan the advocacy strategy and give you ideas, tips and inspiration to develop your own plan.

Step 1: Identify the challenge you face

Before starting to plan your advocacy strategy it is important that you ask yourself several questions that will help you shape in the best way your efforts as well as to identify problems and opportunities.

What is the problem you are trying to solve?

Advocacy is about seeing a problem and setting out to solve it. This specific toolkit has been designed for institutions that need to advocate for support to guarantee access to scientific information. You or your institution may find themselves in the following situations or facing the following problems:

- An institutional library would like to be part of Research4Life and to access the Research4Life resources of the five programmes, but it is situated in a Group B country. **The library has to get funding to pay the annual fee of 1,500 USD.**

- An institution could provide its members with free access to scientific knowledge for years. Then, the classification of the country changes to group B. **The institutional members have to convince their management to pay the 1,500 annual fee in order not to lose access to the Research4Life resources.**

- The librarians of an institution that is subscribed to Research4Life notice that their institutional members are not aware of the resources that Research4Life provides. **They need to raise awareness about the resources they offer. They would like to organize a training and need funding and support from their management.**

- A library would like to make more use of Research4Life but is lacking of the technical equipment to provide online access to the Research4Life resources. **They would like to convince their institutional management to invest in infrastructure or look for other ways of funding.**

Activity 3. Is one of the examples above your case? If not, can you describe the problem you are trying to solve in a clear statement?

Step 2: Setting up specific goals and objectives

Once you have identified your problem you need to think about what is your main goal, and set up specific, measurable, attainable and realistic time-bound (SMART) objectives. Always keep in mind: do these contribute to the realization of your goal?

There is a difference between the terms "goal" and "objective". Goals can be defined as headers for the objectives. In other words, a goal is more general, while objectives can be more specific and relate to one goal.

What is the main goal you aim to achieve?

Here are some example **goals** related to each of the specific problems identified in **Step 1**:

- Obtain funds to pay the Research4Life Group B annual fee

- Raise awareness about the resources that the library offers

- Convince institutional management to invest in library infrastructure

What are the long and short-term objectives that build towards your goal?

Once you have set your main goal or the aim that you want to see achieved in the future, it is time to set out the key objectives that are needed to achieve your goal. Objectives usually describe the policy, budgetary or political change that you want to achieve by the end of your advocacy intervention.

Make your objectives a specific change that you can bring about that contributes to reaching your goal. Aim to make it specific and measurable and define what you will accomplish, where, when, and with whom. Generally, the time frame for an advocacy objective would be 1-3 years, and the objective should focus on a specific action that an institution can take.

Advocacy objectives should be SMART (specific, measurable, achievable, realistic and resourced and time-bound).

When developing an advocacy objective, you need to be both realistic and ambitious. This means that you need to consider what you can realistically achieve in the time-frame you have, given your existing expertise of the policy issues, your relationships with policy makers, and the political context and opportunities.

Step 3: Identifying and analyzing your target audience

Once you have identified your problem, goals and objectives you should build an understanding of the audience you are trying to reach. You need to identify your advocacy target audience. You can have one or many target audiences, what is important is to list them so then you can work out how to influence them. See some examples below:

- The student community of your institution
- Institutional management
- Local policy makers
- Funding institutions
- The Research4Life team

Activity 4. Who is your target audience? List the different types of audiences you are trying to reach and provide a brief description of them.

"Librarians, should try as much as possible to create awareness about research4life programs to promote their use and also the benefits of using research4life to bridge gaps on access to information. In practice, access to Research4life cuts down the budget for electronic resources because researchers can access resources from various publishers in one platform"

Mary Acanit. Kyambogo University, Uganda.

Step 4: Mapping out your resources and capabilities

You can have a limited budget and still develop a successful advocacy strategy. Maybe there are different resources that you can count on or get for free from the Research4Life website. Don't forget to also seek help within your own institution for support. Ask the communications department what kind of channels and media they can offer to spread your message.

Some of the following resources can be found in the Research4Life portal. They can help you when giving presentations, organizing workshops or planning a social media campaign.

- Powerpoint Presentations: Download the Powerpoint presentation for advocacy
- Factsheets/Infographics: A series of infographics about Research4Life and literacy skills
- Posters: Download, customize and print posters in your library
- Case Studies and interviews: Learn and share cases of successful advocacy from other Research4Life users
- Videos: Videos are always an engaging way to present your case, use the videos we have available for you

Activity 5. List the resources that your library has and the ones you can develop yourself to help your advocacy strategy.

Step 5: Developing a strategic plan and activities

This step is where you take action. You need the means to channel all of your planning into effective action. There are different communication and marketing tools you can use to reach your goal. You can implement them in combination or pick just one that better suits your needs. Here we describe some activities you can implement in your strategy:

Organize library open events and invite administrators to attend

Gaining the attention of administrators and executives and breaking through with messages about the mission-critical resources, services and facilities provided by the library.

Evidence is one powerful means of convincing decision makers about your advocacy issue. Presenting your case to your managers or administrators can be a key step to reach your advocacy strategy. It may also be supplemented or substituted by research and data collection about the usage of your library. You can conduct research/data collection in a participatory manner by conducting interviews.

We have created a free downloadable **Powerpoint presentation** for you, which contains key information and evidence about the impact of Research4Life. This can help make your case, and you can use and tailor this to your needs.

> *"When advocating for the provision or use of Research4Life one need to fully convince the administration by letting it know all the advantages of using Research4Life Databases"*
>
> *Taphros Madondo. Africa University, Zimbabwe.*

Tip: Get some insights in how to communicate with administrators and executives. Read these 5 tips from Elsevier Connect

Conducting Interviews

Using interviews as a way to gather testimonies of the usage and impact of Research4life within your institution will support your case. Evidence and data from your institution is important to reach out to the researchers, students and faculties in the areas of:

- Health/Medicine
- Agriculture/Nutrition/Forestry/Livestock/Soil/Aquaculture
- Environment/Energy/Ecology/Biology/Waste Management/Ecology/
- Innovation/Technology
- Law

You can ask them the following questions:

- Do you know about the online resources offered by the library and how to access them?
- How many times have you used the library online resources in the past week/month/year?

Workshop facilitation

Research4Life provides resources (training material, video tutorials and webinars) that you can use to organize a workshop on how to use the different programme platforms. The Research4Life Training portal includes several free downloadable modules about different subjects.

- **About Research4Life**

  Research4Life general training material in order to understand the similarities and differences between our five programmes: AGORA, Hinari, OARE, ARDI and GOALI.

- **Authorship Skills**

  A set of 10 modules to develop authorship skills. How to read and write scientific papers, intellectual property and web bibliography along with hands on activity workbooks.

- **Reference Management Tools**

  Training modules to learn how to use different reference management tools to reference bibliographic data.

- **Programme Specific Training**

  General information and links to each of the specific training modules for the different Research4Life programmes.

If you want to become a Hinari, AGORA, OARE, ARDI or GOALI trainer, you can also attend the webinars that Research4Life provides. Online courses are also offered. Stay updated by subscribing to the Research4Life Newsflash.

> *"Our experience shows that the best way to make the resources known is to conduct training to various groups of users (including top management). Promotion and awareness raising alone is inadequate. People understand and feel the value of these resources when they are show how to access, retrieve and use, and when they see the e-articles, books etc."*
>
> *Alfred S. Sife. Moshi Co-operative University, Tanzania*

Marketing your library

The process of developing a marketing strategy shares some of the steps needed to develop an advocacy strategy. However, marketing and advocacy are essentially different. Marketing is more customer oriented and aims to "sell" a product or service. It is nevertheless a powerful tool to implement as an effort which will increase your library visibility.

Now, more than ever, marketing should be a part of the library's overall strategic planning process. Libraries must develop a marketing plan that incorporates the library's strategic plan as well as the mission and vision statements.[7]

The purpose of a marketing plan is to provide a framework for the effective, logical, and comprehensive development of marketing activities. A thoughtfully created marketing plan that is uniquely tailored to an individual institution will also help a library use its resources (staff, time, and money) more efficiently.

Research4Life p**rovides a module on how to market your library**. Review this module in order to develop a marketing strategy for your library.

Social Media Advocacy

Using social media as an advocacy tool helps amplify your efforts by potentially reaching more people, in more places, faster than ever before. To use social media effectively, you should have a clear plan in mind of who your audience is, which social media platforms are most suited to that audience, and what results you hope to gain from your efforts.

The advantages of using social media include are the low costs involved in the set-up, the potentially wide reach you can obtain and the quick possibility of sharing your library messages.

> **Tip:** Select one main social media platform during your advocacy campaign. This could be your library website or your Facebook page. If you don't already have one, create it. It will be the hub of all your online advocacy work.

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[7] Duke, L. M. & Tucker, T. (2007)

Other activities

In this toolkit we have presented some of the most used tools and activities to implement in an advocacy strategy. However, there are multiple ways to reach your objectives. Here are some ideas you can explore:

- 52 weeks of ideas for advocating for public libraries! Public Library Advocacy throughout the Year: http://www.ala.org/advocacy/sites/ala.org.advocacy/files/content/advleg/advocacyuniversity/frontline_advocacy/frontline_public/52ways.pdf

Activity 6. Write down a mix of tools and activities you wish to implement for your communication strategy and organize them in a calendar.

Step 6: Monitoring and evaluating your results

Your advocacy strategy is the base to support the successful achievement of your overall goal, so it is helpful to monitor your progress and check how your objectives are working out. At regular intervals, and depending on your agenda, conduct an evaluation of each objectives. If you find that the progress towards one is slower than the others, your activities for that objective may be ineffective or need to be changed or improved.

Each activity has different means of evaluation. Try to think about how are you going to measure the outcome of each activity in your mix.

- Open events: How many people attended? Where they satisfied with the event? You can conduct a small satisfaction survey about your library event.
- Interviews: Did you gathered the intended data you wished to obtain? If not, why?
- Workshops: Create a small survey before and after the workshop and ask the attendants to give you feedback about their experience. Analyse your results and reflect on how you can improve your next workshop
- Social Media: What were your specific objectives for this activity? Likes? Engagement? Or simply setting up social media accounts?

4. Learn about Case Studies of successful

advocacy
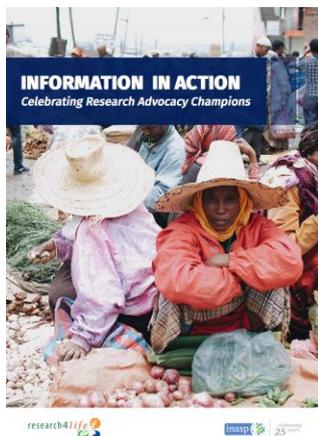
In 2016, Research4Life and INASP launched a [competition](#) to celebrate the critical role of advocacy in research and got a resounding response. More than 150 stories rolled in from researchers, doctors and librarians across the developing world. Many of them shared the hurdles they had overcome to boost leadership support for peer reviewed resources and for evidence-based policies based on that critical information. These include resources to improve access, infrastructure and funding, all of which contribute to improved evidence-based health care, agriculture and environmental policies.

Uganda: Mary Acanit

Mary Acanit successfully advocated for the connection of Kyambogo University to the Research and Education Network for Uganda (RENU), which aims to connect all Ugandan universities, colleges and research institutions via an affordable country-wide high speed network backbone for cheaper & faster access to global research resources.

Zimbabwe: Alice Matimba

Alice Matimba's team successfully advocated for a health policy that has transformed the care and treatment offered to patients diagnosed with diabetic retinopathy and other eye complications.

Papua New Guinea: Lui Philip Kame

Lui Philip Kame, a Technical Services Librarian at the PNG University of Natural Resource and Environment in Port Moresby, Papua New Guinea, developed a solution himself: a mini-ICT networking system that provides online services for the library to complement its traditional over-the-counter services.

5. Further tips and resources

Research4Life Homepage: www.research4life.org/

The Research4Life team regularly posts news on the Research4Life homepage. Stay informed and share information about technological advances, eligibility, training opportunities and marketing campaigns.

On Research4Life you always find the latest numbers and figures about resources available on the five Research4Life programme platforms.

Research4Life DGroup: https://dgroups.org/groups/research4life

The Research4Life Dgroup is a mailing list that updates its users about news and training opportunities of the partnership. The Dgroup includes a discussion forum that allows all members to participate.

Research4Life Facebook: www.facebook.com/R4Lpartnership/

The Research4Life Facebook channel to stay informed about the latest Research4Life news. We invite our users to widely share our posts.

Research4Life Twitter: twitter.com/r4lpartnership

The Research4Life Twitter channel to stay informed about the latest Research4Life news. We invite our users to widely share our posts.

Research4Life Newsletter and Newsflash

Twice a year, Research4Life sends out a newsletter with the most important advanced within the partnership. You are invited to share both the newsletter and the newsflash in your institution. You might consider to use parts of the news to implement them in your advocacy strategy.

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