SPEAKERS

- **Courtney E. Chartier**
  - Emory University Manuscript, Archives, and Rare Book Library
  - *Advocating to the Public: Raising Awareness from the Classroom to the State House*

- **Geoffrey A. Huth**
  - New York State Archives, Government Records Services now with New York State Unified Court System
  - *Defining Archives for Local Government Archives and Records Management Programs*

- **Greg McCoy**
  - Procter & Gamble Company
  - *Advocacy in Archives: Making Yourself Relevant (Lauren Breyer State Farm Insurance Co.)*
  - *Helping Business Archivists to Help Themselves: BAS Advocacy Toolkit and the 2014 BAS colloquium*

- **Sarah A. Polirer, Chair**
  - Cigna Corporation, Corporate Research
**DEFINITION**

- **advocacy**
- /əˈdvəkəsi/ [ad-vuh-kuh-see]

- noun, plural advocacyes. *the act of pleading for,* supporting, or recommending; active espousal:
- He was known for his advocacy of states' rights.

- **Origin:**
- 1375–1425; late Middle English advocacye < Medieval Latin advocātia. See advocate, -acy

- Source: American Alliance of Museums presentation, Baltimore, MD May 19, 2013
Raising Awareness from the Classroom to the State House

Courtney Chartier
Emory University/Society of Georgia Archivists
“BE PRESENTATION READY AT ALL TIMES”
PRESENTATION READY, AT ALL TIMES

Courtney Chartier
Emory University
Society of Georgia Archivists
BASICS OF THE CLASSROOM CODE

- Everyone is your audience
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- Everyone is your audience
- Listen to the President
BASICS OF THE CLASSROOM CODE

- Everyone is your audience
- Listen to the President
- Choose only the freshest ingredients
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- Everyone is your audience
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- If you are there to teach, they are there to work
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- If you are there to teach, they are there to work
  - Let them get handsy
BASICS OF THE CLASSROOM CODE

- Everyone is your audience
- Listen to the President
- Choose only the freshest ingredients
- If you are there to teach, they are there to work
  - Let them get handsy
  - As far as they know, you ARE Indiana Jones
Your mother was wrong: it’s more than polite to talk about money
BASICS OF THE STATE HOUSE CODE

- Your mother was wrong: it’s more than polite to talk about money
- Who did you say you were with?
BASICS OF THE STATE HOUSE CODE

- Your mother was wrong: it's more than polite to talk about money
- Who did you say you were with?
- Your mother was right: don't ever walk alone
BASICS OF THE STATE HOUSE CODE

- Your mother was wrong: it’s more than polite to talk about money
- Who did you say you were with?
- Your mother was right: don’t ever walk alone
- Squeak! Squeak!
BASICS OF THE
STATE HOUSE CODE

- Your mother was wrong: it’s more than polite to talk about money
- Who did you say you were with?
- Your mother was right: don’t ever walk alone
- Squeak! Squeak!
- In person: Squeak! Squeak!
TYING THE CODES TOGETHER:

Presentation ready.
TYING THE CODES TOGETHER:

Presentation ready. At.
TYING THE CODES TOGETHER:

Presentation ready.
At. All.
TYING THE CODES TOGETHER:

Presentation ready. At. All. Times.
The Fight for the LGRMIF
Geof Huth, New York State Unified Court System
(formerly New York State Archives)
THE SETTING

- Local Government Records Management Improvement Fund
  - Begun in 1990 with new staff
  - Statewide regional advisory and training
  - Programs for retention scheduling and technical publications
  - 2300 grants ($49M) for archives and records management projects (1990-1994)

- LGRMIF Scheduled to Sunset in Five Years
  - Program would end in 1995
  - About 4,000 local governments in the state at the time

- A Long Story
  - 4 campaigns, 3 successful
  - And a coda consisting of 2 campaigns
First rule of advocacy
Be indispensable
Provide Service People Want and Need
- Excellent service
- Quick response times
- A service ethic that sees people as people
- A reason for your constituents to care

How We Did It
- Excellent workshops and publications for free
- Free advice on records management and archives
- Grants to solve their records problems
- A friendly voice, a friendly face
- Being everywhere
2nd rule of advocacy

MAKE FRIENDS
MAKE FRIENDS

- Create the Allies You Need
  - “We’re in the relationship-building business”
  - The more you help people, the more they will help you
  - Create value people recognize and need
  - See service as the highest human goal
  - Build influence

- How We Did It
  - Always responsive, always helpful, always there
  - Met people on weekends and evenings
  - Attended conferences of our constituents
  - Knew them individually and as friends
  - Created value that people would fight for
  - Local government officials on our advisory bodies
3rd rule of advocacy

ADVERTISE
ADVERTISE

- **Ensure People Know Your Good Work (Awareness)**
  - Prove yourself dependable through the work you do
  - Remind people you can do the same for them
  - Distribute information on your work and its value

- **How We Did It**
  - Public reports: *Toward a Usable Past* & *The Quiet Revolution*
  - Statewide newsletter: *For the Record*
  - Video: “Public Records, Public Trust”
  - Stories in the press across the state and in the capital
  - Reports by region on successful records programs
  - E-newsletters from each region
  - Promotion of great local government programs
  - Awards to strong local government records programs
THE PRECEDING WAS

PRE-ADVOCACY

& NOW TO ADVOCACY:
4th rule of advocacy

Know what you need
Know what you need

- **Define Your Needs**
  - Know exactly what needs to happen
  - Collect the details, the cost, the time it will take
  - Know how to enumerate and explain the benefits
  - Calculate the benefits

- **How We Did It**
  - We needed to continue our program
  - We needed to improve local government records programs
  - We needed to eliminate or delay the Sunset
  - We needed to save our jobs
  - We still wanted to change the world
5th Rule of Advocacy

Know What To Say
Know What To Say

- Say the Right Things
  - How this change is good for who you’re talking to
  - How this is good for your constituents (not how it is good for you)
  - How their support will change the world
  - Talk to who you’re talking to

- How We Did It
  - We extolled the success of our program
  - We detailed how much money we saved—staff time, space, lost information
  - We told politicians who we had helped in each of their districts
  - We allowed those we helped to do most of the talking
6th rule of advocacy

WORK WITHIN NETWORKS
WORK WITHIN NETWORKS

- Advocate with Others (Do not Work Alone)
  - Many voices is better than one
  - Coordinate any advocacy with supporters
  - Plan everything with others
  - Make sure everyone knows they are working together

- How We Did It
  - Many people worked with us: constituents, associations, politicians
  - We created talking points and resolutions—others distributed them
  - We had communication trees to move information quickly
  - “The switchboard is overloaded”
  - We did well because we had done well
7th rule of advocacy

MEET

THE DECIDER
MEET THE DECIDER

▪ Find the people who make the decisions
  ▪ Realize you may have to convince many to convince one person
  ▪ Use contacts and influence to reach through others to the decider
  ▪ Speak to that person yourself if possible
  ▪ If not, train others how to speak for you

▪ How We Did It
  ▪ Our program was conceived of by local government politicians
  ▪ They and legislators behind the program worked from within
  ▪ Friends of the governor contacted the governor
  ▪ Hundreds of local officials contacted every legislator in the state
8th rule of advocacy

SUSTAIN

THE EFFORT
SUSTAIN THE EFFORT

- Keeping Everything Going
  - Keep doing excellent work
  - Sustain the advocacy effort until you succeed
  - Sustain it afterwards
  - Don’t let people forget you

- How We Did It
  - We gave everyone credit for the work they did
  - We started early, before the Sunset was set to set
  - We followed the campaign plan diligently
  - When we won, we improved our program to meet new needs
  - We continued to help people
  - We continued to be indispensable
9th rule of advocacy

INVENT

NEW RULES
[SLIDE INTENTIONALLY LEFT BLANK]
The final rule is “do it”

Perform advocacy
HOW WE DID IT

- Campaign Leaders (State Archivist, Dep. Commissioner, Program Head)
  - Set directions and guided the campaign

- Regional Advisory Officers and Other Archives Staff
  - Distributed info, asked for help person by person, and gathered information

- Local Government Officials
  - Spoke to their executive bodies, legislators, and associations

- Statewide Local Government Associations
  - Used their lobbyists for the cause, and asked for help from their members

- Data and Coordination
  - GIS of political districts, databases of resolutions passed and letters sent
  - 700 resolutions from local governments, campaign literature with all legislators
  - Constant contact between the field and Albany and allies across the state
OUR RESULTS

- 1994: Early Bill to Extend the Fund Passed Only the Senate
- 1995: The Fund Extended for 5 Years
  - Worked with legislative leaders to craft the bill
  - Distributed a factsheet on the Fund to all legislators
  - Worked with NYALGRO on a white paper about the Fund
  - 700+ local governments and 50+ associations passed resolutions in favor
  - New Governor, Pataki, had voted for extension while in the Senate
- 2000: The Fund Extended for Another 5 Years
- 2005: The Fund Made Permanent
  - Repeated our previous steps with similar results
FINAL LAST ULTIMATE WORDS

WHAT ADVOCACY TAKES
WHAT ADVOCACY TAKES

- Effort
- Persistence
- Time
- Heart
- Resilience (You Don’t Always Win)
ADVOCACY IN BUSINESS: MAKING YOURSELF RELEVANT

HELPING BUSINESS ARCHIVISTS TO HELP THEMSELVES: BAS ADVOCACY TOOLKIT AND THE 2014 BAS COLLOQUIUM

Greg McCoy
Procter & Gamble Company
Target's archivists cut in layoffs

Oct 11, 2013, 12:54pm CDT  Updated Oct 11, 2013, 1:45pm CDT

INDUSTRIES & TAOS  Retailing & Restaurants

John Vonhoff Jr, Staff

Report writer/broadcaster
Minneapolis/St. Paul Business Journal

Property Spotlight: Metropoint, The Center for Business

Target Corp. employees in charge of chronicling the retailer's storied past were among those eliminated in this week's layoffs.

When Target cut about 150 jobs this week (citing a reorganization to eliminate areas of duplication), the Minneapolis-based retailer discontinued... more
11 October 2013

Gregg Steinhafel
Chairman, President and Chief Executive Officer
Target Corporation
Minneapolis, MN

Dear Mr. Steinhafel,

Greetings. We are writing to you today as concerned Target customers, as archivists and as members of the Issues & Advocacy Roundtable, a section of the Society of American Archivists (SAA). The Society of American Archivists is North America’s oldest and largest national archival professional association, and part of its mission is to promote the values and diversity of archives and archivists. Our Roundtable tracks issues of importance to archivists and the archival community. This letter concerns the recent decision by Target to discontinue its corporate archives.

We were surprised and saddened to hear of this turn of events. Obviously we are most concerned for the future of our professional colleagues who are now unemployed. Although we realize that companies from time to time make organizational changes which can lead to staff reductions, Target’s Archives and its staff have been a model for corporate archives and archivists. In fact, several of those employees have served in leadership positions with the SAA. Their leadership demonstrated Target’s commitment to the historical record, professional development, and innovation. We are truly surprised because we believed that Target recognized the critical importance of corporate archives and archivists to the company’s historical legacy and the enduring continuity of its operations.

Prominent and farsighted corporations understand that their archives document the historical development and progress of their organization and products. They further understand that archives provide critical support for marketing campaigns, trademark protection, and provide media with historical documentation and images which demonstrates the corporation’s impact on American society. Target has a long and storied history since its original founding in 1902 as Dayton Dry Goods. In the subsequent 111 years your company has become a visible and influential component of American economic life. Without Target’s corporate archives and the hardworking professionals who staff it and make it accessible, documenting and preserving Target’s historical and ongoing evolution will become extremely difficult, if not impossible.
Advocating Business Archives Toolkit

Business Archives Advocacy Toolkit

Advocating for one's self and archival collection is a constant effort, and unfortunately there's no silver bullet that will work for every business archives every time. As stated in the 2013 defense of the Georgia State Archives, "Too often, advocacy is effectively crisis management, responding to specific events. Proactively developing a plan allows time to consider a range of options, find ways to refine the message, and identify and educate a broad range of stakeholders."

Therefore the intent of this page is to provide Business Archives Section (BAS) members with a resource center to allow development of individualized advocacy plans to avert future issues, and if necessary to successfully "win the day". There is a wealth of advocacy information available, and this list is not exhaustive but merely a starting place for you develop your own policies. Materials listed and provided are not endorsed by BAS, but rather provide solid examples for you to consider leveraging.

How to Get Started

- **Advocacy Plan Development Worksheets** - Developed by the American Library Association (ALA), these worksheets should serve as a good guide and idea starter.
- **Examples of Advocacy Toolkits** - Links to the SAA Issues & Advocacy Roundtable's Advocacy Toolkit page.
- **AASL Crisis Toolkit** - Provides solid guidance on what to do if your program is in imminent danger and enlisting stakeholders in your cause.
- **"Every Voice Makes A Difference"** - Summary document from ALA on everyday techniques to improve advocacy.

Articles on the Value of Archives

- **"Making the Case for Museums: 75 Advocacy Ideas"**, American Alliance of Museums, 2013
- **"Why an Archive"**, Diane Everman, Archivist at Enterprise Corp., 2014 ***NEW***
- **"Long-term benefits of a corporate archive program"**, Robert Surlano, Archivist at Parker Hannifin, 2016 ***NEW***

BAS Members Recommendations and Success Stories

Click here to access the page featuring recommendations and success stories submitted by BAS members. With the diversity of skills and programs within BAS, we hope that you find something that can be applied to your own organization. To make contributions to this page, please email bascontact@gmail.com.
BAS Advocacy Success Stories

Professional Movies at Zero Production Cost - Bill Jackson, Harley-Davidson

Using iMovie on my Mac at home, I created a compelling four minute video aimed at inspiring our employees and informing them of the capabilities and assets that were to be found in the Archives. The video was sent to employees via email with the explicit instructions, "Take a break and watch the attached video. Contact the Harley-Davidson Archives to put our history to work for you. Our story doesn’t belong only to the past." I loaded the content and the videos, did the editing, title screens, found the font for free on the internet, added the music, etc. Other than my time, the cost for doing this was $0. With today’s technology it’s a myth that you need a big budget to do something like this.

The response was very positive - people loved it. There were even those who wanted to use it publicly, and people continue to refer to it as a benchmark. I’ve heard that Marketing leadership has even urged the creation of a video that is “more like that video Bill Jackson did.”

Unfortunately though the message of “You’re a part of Harley history too” was missed and it did not seem to generate interest in using more archival film and video. My key learning from this experience was that when we do something like this again in the future, we have to be far more explicit about what we’re trying to convey.

Internal Newsletters, Videos, & Site Posters - Eric Chin & Jeff Pirtle, NBCUniversal

We have a weekly internal newsletter at NBCUniversal and this past issue featured two pieces that include Jeff providing informational videos. The first one focuses on our vintage poster collection around the lot, and the second appeared on our internal video channel. In the second one, Jeff provides a bit of background about himself and what the Archives does for the company. Both have given us great exposure and reminds employees of our purpose and existence.
Archivists at Coke, Wells Fargo, McDonald's Advocate for Marketers -- and Themselves

Meet the Brand Keepers Trusted With Marketers' Histories

By Natalie Zmuda. Published on September 03, 2014.
SUMMARY & RESOURCES
Setting
- institution’s goals and expectations

Culture
- of the setting/institution

Culture
- of the audience receiving the advocacy

Learn
- from each other with specific examples to broaden our approaches
● SAA
  ● http://www2.archivists.org/groups/issues-and-advocacy-roundtable
  ● http://www2.archivists.org/groups/business-archives-section

● ICA [International Council on Archives]

● ERIN MEYER “The Cultural Map: Breaking Through the Invisible Boundaries of Global Business”
THANK-YOU
QUESTIONS