Turning
THE Page

**SUPPORTING LIBRARIES,
STRENGTHENING COMMUNITIES**

Advocacy Training Implementation Guide | 2014

Thank you for your interest in *Turning the Page: Supporting Libraries, Strengthening Communities.*

We live in an age where information—and the opportunity that it can provide—is increasingly available to people with Internet access and the skills to navigate the digital world. And yet, more than one billion people live without this access. For more than two decades, the Bill & Melinda Gates Foundation has been investing in public libraries, understanding that they are the community institutions uniquely suited to unlock the power of information and opportunity and improve the lives of the "information poor."

Globally, public libraries are essential local institutions providing resources and services that are meeting local needs and helping to close the opportunity gap. They provide so much more than books. People learn new skills and put them to use searching for employment, connecting with government services, researching health and other important issues, or connecting with distant family and friends. In many rural or poor communities, a public library is the only place with free access to computers and the Internet.

Yet, many public libraries face funding challenges, especially in resource-constrained environments. The foundation's Global Libraries initiative has focused on strengthening the library field and building the capacity of library staff and supporters to advocate for policy and funding changes to meet community needs over the long-term.

With this in mind, we are excited to share *Turning the Page*: *Supporting Libraries. Strengthening Communities*. This advocacy training curriculum was originally developed by the Public Library Association in the United States to build the advocacy skills and confidence of public library staff. In 2011, the advocacy training curriculum was adapted for the international public library community in partnership with the Global Libraries' Advocacy Working Group, a global network of advocacy specialists in our grantee countries.

We are pleased to make the curriculum available to individual libraries, library networks, associations and foundation partners. It includes content, training tools, and materials for anyone who wants to conduct an advocacy training program. The materials are easy to customize in order to ensure that the training is relevant and appropriate for public library staff in any country or region.

We hope that you will use this curriculum as a resource to support library advocacy at all levels – and share it with others in the field. Public libraries throughout the world are helping their communities thrive, and it's our honor and pleasure to offer this resource to support their efforts.

Best Regards,

Deborah L. Jacobs
Director, Global Libraries
Bill & Melinda Gates Foundation

Advocacy Training Implementation Guide

OVERVIEW

Public libraries have the power to improve the lives of people around the world and to connect communities to a wealth of information, knowledge and opportunity. In order to provide the critical programs and services that people depend on, libraries rely on support from government and local communities. Library staff and leaders must work diligently to sustain this support—whether it is funding, local and regional policies, or simply positive public opinion. Advocacy is a critical skill that helps build support and demonstrates the many ways libraries are important to the communities they serve.

The Bill & Melinda Gates Foundation is committed to growing the advocacy capabilities of public libraries throughout the world so they can continue to provide their communities with the access to opportunity that comes with digital skills and connectivity. Since 2002, the foundation's Global Libraries initiative has been providing grants to programs and associations throughout the world that improve technology access, foster innovation, train library leaders and advocate for policy changes and funding.

> ### The Training Coordinator
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> *This training program implementation guide is primarily organized by task rather than by specific roles. It provides advice and guidance for anyone involved in planning, customizing, and training. However, sometimes we refer to the Training Coordinator to describe the role of main organizer of the training program. Whether this role is performed by one person or split among many, it includes hiring, logistics, working with participating libraries, evaluation—essentially, all the tasks aside from customizing the curriculum and performing the training.*

The *Turning the Page: Supporting Libraries, Strengthening Communities* curriculum is a resource to **improve the advocacy knowledge and skills of public library staff and partners**—and ultimately to improve the results they see through advocacy. It is written not only for Global Libraries grantees, but to be used by anyone interested in teaching library leaders and library staff to conduct effective advocacy.

This advocacy training curriculum was originally developed by the Public Library Association, to help library leaders and staff build the knowledge and skills they need to become better, more empowered advocates for libraries. In 2011, it was adapted by advocacy and training specialists for global use: it has been tested throughout the world by teams and organizations that have received grants from the Global Libraries initiative to implement large-scale national advocacy training programs. This version has been updated to reflect the experiences and successes of these teams.

The curriculum includes content, training tools, and materials that will support the delivery of advocacy training to library leaders and staff. The curriculum is intended to be localized and customized as needed to ensure the training is relevant and appropriate for local needs.

Each team using this training curriculum has its own unique approach:
- Some programs have used the curriculum to build their advocacy training programs from scratch, while others already had existing training programs, which they adapted to incorporate the sessions and supporting materials from the curriculum.
- Some programs have delivered the training curriculum exclusively through in-person trainings, while some have also used online training and webinars.
- Some programs focus on training library staff and library leadership— either together or separately—while others have found it beneficial to include key community stakeholders and decision-makers in the trainings as well.
- All programs have made adjustments to fit the needs and culture of their communities.

Based on these groups' experience and counsel, we have updated the implementation guide and training curriculum to be easier to understand, customize, and deliver. Throughout this guide, you will find advice from the teams that have used this training curriculum, along with examples from their advocacy training programs.

TRAINING GOALS
The primary goals of the advocacy training curriculum are to:
1. Improve participants' **fundamental knowledge** of advocacy for public libraries.
2. Improve participants' **use of tools and strategies** for conducting advocacy on behalf of public libraries.
3. Increase participants' **confidence** in being able to advocate on behalf of public libraries.
4. Improve participants' ability to develop, implement, and manage a comprehensive **Advocacy Action Plan**.
5. Spread advocacy **best practices** into other aspects of participants' libraries.

THE TRAINING PROGRAM IMPLEMENTATION
Overall, there are many steps in the successful implementation of a training program, and one of the first is to create a good training plan. Each plan will be different, with different timelines, staffing, special considerations, and participants. Here are some of the steps a good training plan will include:

- **Learning and Organizing:**
    - Learn what advocacy is generally, and in the context of this training. If the word advocacy does not exist in the target language, determine the word or phrase you will use instead.
    - Hire or identify a lead trainer who will work with you on the curriculum customization efforts.
    - Define the main elements of your training evaluation plan.
    - Prepare for the customization by sending out and analyzing the results of a pre-training assessment to inform your understanding of the training needed.
- **Customizing and Logistics:**
    - Do a first draft of the curriculum customization.
    - Hire or identify trainers who will deliver the training.
    - Plan and perform training logistics tasks, such as arranging training dates and locations, communication with involved libraries, and participant registration.
- **Piloting:**
    - If you are using more than one trainer, conduct a training of trainers and run a pilot training.
    - Complete major curriculum customization.
- **Training and Follow-up:**
    - Deliver the training.
    - Plan for follow-up training, mentoring, peer networks, or other activities to support participants after the training.
    - Implement immediate and long-term post training assessments.
    - Ensure follow-up activities occur.
    - Gather what your team has learned about what worked well or not so well, so you can improve the next time.

ABOUT ADVOCACY

Advocacy is critical to building public support for long-term funding for public libraries.

Advocacy helps to ensure that libraries have the resources to offer important services to the community and can secure a place at the table for library leaders where important funding and policy decisions are made. It can also inform public library users and the community as a whole about library services and their value and demonstrate how public library services—including access to the Internet—improve the lives of people in the community. For these reasons, we believe that advocacy must be a permanent part of every public library— practiced by library leaders, staff, and even external community supporters.

For this training curriculum, advocacy is defined as:

The actions individuals or organizations undertake to influence decision-making at the local, regional, state, national, and international level that help create a desired funding or policy change in support of public libraries.

Turning the Page Curriculum and Content Overview

THE *TURNING THE PAGE* CURRICULUM AND RELATED MATERIALS

The *Turning the Page* advocacy training materials are provided in three parts. We encourage you to adapt and change the materials in whatever way you deem appropriate for training participants, from the content that is covered to how the training is delivered. Here is a description of the materials included:

Part 1: The *Turning the Page* Implementation Guide

This is the publication you are currently reading. It is designed to help you plan, staff, and implement the *Turning the Page* advocacy training program, and also prepare you to customize the curriculum and its delivery. It provides tools and guidance for evaluating your advocacy training program.

Part 2: The *Turning the Page* Curriculum

This is the content and supporting materials that will help the trainers you select to implement a *Turning the Page* training program. The curriculum is made up of 15 sessions, each containing detailed lesson plans and participant worksheets and handouts. It also includes suggested delivery methods and activities, as well as talking points for the trainer.

Part 3: The Advocacy Action Plan Workbook

The Advocacy Action Plan Workbook is a tool for training participants to develop an advocacy plan for their public library. This tool is part of the training materials and will be used throughout the training by participants, who will complete the sections of the workbook so that at the end of training they will have built a library advocacy plan that is ready to implement.

ADVOCACY TRAINING CURRICULUM OVERVIEW

The training curriculum involves 15 training sessions that work together to instill an understanding of the value and need of advocacy, guide the participant through creating an advocacy plan, and build the skills necessary for implementing that plan.

The training sessions include:

1. Introduction
   This session introduces participants to the *Turning the Page* training program and prepares them for the sessions to come. Focused more on the logistics of the training, this session will walk participants through the agenda for the advocacy training, the format of the sessions, and the supporting materials and tools they will be using. Participants will complete an advocacy self-assessment survey to identify the advocacy knowledge and skills they want to develop or strengthen during the training.

2. Value of the Public Library *(Core)[1]*
   This session focuses on building a foundation for the rest of the training by stressing the value of the public library and motivating participants to undertake advocacy on behalf of their libraries. This interactive session sets the tone for an engaging and successful training.

3. Defining Advocacy *(Core)*
   Ensuring participants have a solid understanding of advocacy is absolutely critical to the success of the training. This session focuses on what advocacy is, why it is an important part of library work, and what advocacy could look like in a specific community. Trainers will highlight some key advocacy tactics and provide relatable examples of advocacy from the community or region.

4. Developing Your Advocacy Goal *(Core)*
   The first step in developing an Advocacy Action Plan is for a participant to determine what he or she wants to achieve. Trainers will help participants define what an advocacy goal is, how best to develop an advocacy goal for their library, and how an advocacy goal can be used to develop a full advocacy plan. Trainers will help participants develop their own advocacy goals to use throughout the remainder of the training.

5. Identifying Target Audiences *(Core)*
   An essential component of advocacy is knowing who the decision-makers are that advocates need to reach to achieve their library advocacy goal. During this session, trainers will lead participants in discussing the concept of a target audience and why it is important to identify one. Trainers will lead activities to help participants identify the right target audiences for their libraries.

6. Using Library Perception Information and Impact Data
   Understanding people's perceptions of a library—what they think and feel about the library—will help the library plan and conduct an advocacy effort. Additionally, information about how libraries improve their communities—or

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[1] "Core" sessions are deemed critical for any advocacy training. For more details, please see page 30.

"impact data"—can help further persuade and motivate audiences. In this session, trainers will help participants learn about library perception information and impact data, and discuss how they can use this information to support their library advocacy efforts.

7. Creating Library Advocacy Messages *(Core)*
Effective advocacy messages provide audiences with a clear understanding of a library's advocacy goal and how they can help the library reach its goal. During this session, trainers will review the elements that are needed to develop strong library advocacy messages, and then participants will practice developing their own messages that can support their library advocacy efforts.

8. Creating a Library Story
Everyone likes a good library story. In this session, trainers will lead a discussion about the elements of a good story, how to integrate both facts and examples into your story, and how different types of library stories will appeal to different audiences. Participants will practice turning information about their library into a compelling story.

9. Telling Your Library Story
Opportunities to talk about the library happen every day. It is important for library advocates to be ready to tell a short, compelling story about the impact a public library has and how it is valued by the community, to capture the attention and interest of their audience. In this session, participants will draft a short library story and practice telling it to their peers.

10. Effective Presentations
A successful presentation is a combination of interesting and relevant content and how it is presented. In this session, trainers will help participants explore their personal presentation style, discuss how to prepare for a presentation, personalize a short sample presentation, and practice delivering their sample presentation.

11. Media Planning and Outreach
Engaging traditional media—such as newspapers, radio, television, and related online news outlets—is an important tactic, but one in which advocates often lack confidence. In this session, trainers will review the key steps involved in traditional media outreach and tips for speaking with the media.

12. Social Media and Advocacy
Today, social media, such as Facebook, Twitter, and YouTube is as effective a library advocacy tool as traditional media. In this session, participants will

discuss the differences between traditional media and social media and review how social media can be used to reach your target audiences.

13. Making a Library Funding or Policy Request

All public libraries need adequate funding in order to meet both existing and anticipated community needs through library services, resources, and programs. In this session, trainers will lead a discussion on various types of funding and the steps to take to make funding requests, with a focus on the challenges, opportunities, and audiences that will influence the success of this effort.

14. Building and Sustaining Library Partnerships

Building strong partnerships takes time and commitment, but library partners can play an important role in helping to achieve participants' library advocacy goals. In this session, trainers will lead a discussion about the different types of partnerships, the key steps to take to build successful partnerships, and practical tips for sustaining partnerships for a library.

15. Putting Advocacy Plans into Practice

Once participants have developed their Advocacy Action Plan, keeping their plan on track is essential to advocacy success. In this session, trainers will lead a discussion on how to make an advocacy plan a reality and how to effectively build an advocacy team. Trainers will also help participants identify the first steps they will take to introduce and build support for their advocacy plan, and learn when and how to adjust and refine it.

CUSTOMIZATION

These 15 sessions provide a foundation on which to build an effective advocacy training for library staff and partners. They are written to be broadly applicable to as many situations as possible. You should work closely with trainers to customize the content and delivery to align with library organization and funding structures of your community or country, social norms and opportunities, and the knowledge and skill development needs of the training participants.

More information is available in the "Localizing and Customizing the Curriculum" section of this guide.

Learning about Libraries and Library Staff

"You must first understand the needs of the library community. We engaged a librarian and a professional trainer in our curriculum development from the beginning. We also piloted the training to determine what worked best, and found that we needed to make some adjustments to the training, including rearranging some topics and lengthening the training." (from the Poland Team's Advocacy Training Program)

Planning and delivering an effective advocacy training program for public libraries requires familiarity with public libraries and library staff on at least three levels:

- General principles of public libraries
- Roles of libraries and library staff both country-wide and locally in the community
- Funding sources for libraries, relationships with those sources, and acceptable advocacy activities

If your trainer(s) are new to the library community, the following suggestions provide guidance for how they can learn more. Knowing as much as possible about how libraries operate is important so that trainers can customize the curriculum to meet the needs of the library staff being trained.

GENERAL PRINCIPLES OF PUBLIC LIBRARIES

According to the International Federation of Library Associations and Institutions (IFLA), public libraries are the "local gateway to knowledge," providing "a basic condition for lifelong learning, independent decision-making, and cultural development of the individual and social groups." By enabling free and equal access to learning and knowledge, libraries play an important role in the development and maintenance of a democratic society. Key points of IFLA's *Public Library Manifesto* include:

- The public library shall in principle be free-of-charge.
- Services are provided on the basis of equality of access for all, regardless of age, race, sex, religion, nationality, language, or social status.
- High-quality collections and relevance to local needs and conditions are fundamental.
- Collections and services should not be subject to any form of ideological, political, or religious censorship, or commercial pressures.

To learn more about public libraries and general principles of library funding, legislation, and operations, read:

- The full *IFLA/UNESCO Public Library Manifesto*: http://www.ifla.org/publications/iflaunesco-public-library-manifesto-1994 (Note: translations in several languages are available)
- *IFLA Internet Manifesto*: http://archive.ifla.org/III/misc/im-e.htm
- *IFLA Public Library Service Guidelines*: http://www.degruyter.com/viewbooktoc/product/43971

ROLE OF LIBRARIES AND LIBRARY STAFF AT THE COUNTRY LEVEL

Although public library systems are guided by the general library principles noted above, they will vary from one country to the next. There will be differences in structure, governance, varieties of service, and the ways those

services are delivered. Here are a few ways to find out more about your country's public library system:

- **Find out if there is a national association of public libraries**, or a public library division of a national association of libraries. For example in the United States, the American Library Association (ALA) has a Public Library Association (PLA) division, which serves as a portal of information about the nation's public libraries. Identify the organization's leaders and ask for interviews. If there is only a national library association, but no division specifically for public libraries, ask the association leadership to suggest others to speak with.
- **Consult the IFLA World Report Series**, which compiles data on libraries from around the world; the 2010 World Report lists more than 120 countries. Use the [interactive world map](#) to locate your country and access the full report. Report data includes the number of public libraries, number of Internet users, digital divide statistics, and the status of a variety of issues related to libraries and Internet access.
- **Look for media stories** about your country's libraries in mainstream media outlets, industry journals, and online. These stories will provide insights on general public perceptions of libraries and library staff, as well as news about the work they are accomplishing.

ROLE OF LIBRARIES AND LIBRARY STAFF AT THE COMMUNITY LEVEL

Public libraries provide access to information and services that meet the needs of local communities. When planning an advocacy training, it's important to discover the unique characteristics of each library and its staff. Be prepared to adapt the training, as needed, to the local conditions and knowledge. Here are some ways you can become familiar with the local library community:

- Visit the local library to learn more about the programs and public access technology services it provides.
- Meet with local library directors and staff. One-on-one conversations can be one of the very best ways to gain an understanding of the role libraries play in the community, as well as the reality of working as library staff. Questions you may want to ask the library staff include: What are the most popular services that the library provides? Why are technology services important to users? What does your community say about the value of library services?
- Identify local library publications such as newsletters, or local media stories about the library. Look at the library's website (if applicable). Look for news reports about community meetings and events in which the library is involved. If there is time, encourage the person delivering the advocacy training to attend library meetings and community events to increase their understanding of the role of the library in the community, and the value it provides.

LIBRARY FUNDING STRUCTURES

Just as the role of libraries will vary from one country to the next, so will the structures and systems for how public libraries are funded. Understanding the relationships between libraries and their funding sources is critical to determining how the sessions of the advocacy training curriculum will be prioritized and customized.

For example, in Botswana, public officers are barred from engaging with media or fundraising activities. For Botswana's **Sesigo** team, this required careful modification in the delivery of the advocacy training sessions about media and funding requests. Trainers used these sessions as an opportunity to emphasize the need for advocacy while operating within the law. The heightened awareness among library staff as a result of the advocacy training discussions led to agreement among training participants that they should be free to meaningfully contribute to the Botswana National Library Service budget proposals, as well as engage media to be their voice and raise funds for their local libraries.

Learning about Library Advocacy Strategy and Practices

Reminder: Library advocacy is defined as the actions individuals or organizations undertake to influence decision-making at the local, regional, state, national, and international levels that help create a desired funding or policy change in support of public libraries.

Advocacy involves collaboration, both within library systems, and also outside of library systems with partners and stakeholders. It's about convincing the right people to take the action you need to ensure your library can deliver quality programs and information access in the long term. Local government is often the most critical supporter of libraries. However, seeking support from government at the regional and national levels can augment efforts through nationwide training and influence.

Putting an advocacy training program together requires knowledge of the basic concepts of advocacy as well as the realities of each library community where training will occur. It may feel daunting at first, but the benefits of a strong library advocacy program are exponential and establish a foundation to build upon for years to come.
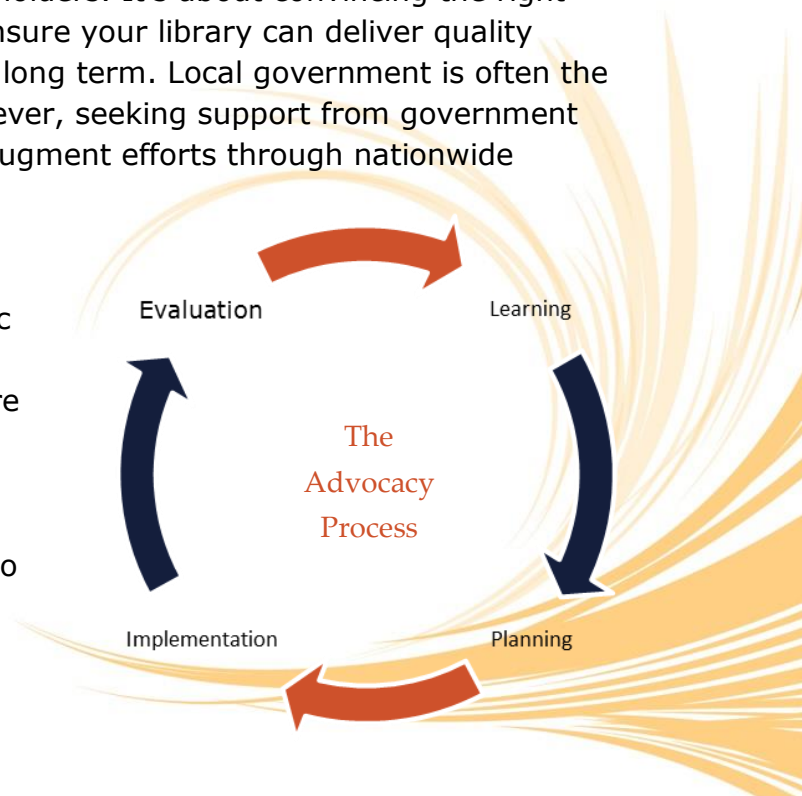
BASIC CONCEPTS OF ADVOCACY

Advocacy is a process that should be an integral part of library staff's work, and even those who are initially unfamiliar with the concept of advocacy will recognize it in both their libraries and communities when they know where to look. There are many elements to advocacy—communications, community relations, outreach, marketing, and lobbying—each of which forms a building block toward both increasing awareness about the library's contribution to the community and securing sustainable public library funding. Anyone can be an advocate for the public library with the right messages, facts, stories, and approach.

Advocacy is an ongoing process, which cycles through four key stages and then repeats as the environment, stakeholders, and advocacy goals change.

1. **Pre-planning and learning**: identifying advocacy goals, stakeholders and target audiences, staff and consultants, risks and proposed solutions.
2. **Advocacy planning**: researching the proposed solutions, gathering information, refining the plan, and beginning to build relationships with target audiences, partners, and stakeholders.
3. **Advocacy implementation**: building coalitions, developing advocacy messages tailored to target audiences, identifying strategies to convince your targets, implementing the strategies, and monitoring progress.
4. **Evaluation of advocacy successes and failures**: evaluating the outcomes of your efforts, making adjustments based on lessons learned, and preparing for the next cycle of planning and implementing.

ORGANIZING AND PLANNING AN ADVOCACY TRAINING PROGRAM

Selecting and Hiring Trainers

The advocacy training curriculum was developed with the assumption that it will be implemented by experienced trainers—whether from within the library system or hired from outside—who are familiar with modern, interactive adult education instructional methods. Interactive training methods help people learn more effectively. The ideal trainer will also be knowledgeable about—or open to learning—the role, organization, and funding of public libraries in your community or country, as well as understanding the concept of advocacy and how to implement advocacy projects and activities. It will likely be rare to find individuals with all of these skills and knowledge, but we suggest you look for skilled trainers who understand at least one or the other: advocacy or public libraries. A full list of recommended trainer competencies is included in Appendix Five.

Your best options for recruiting trainers for your advocacy training program will very much depend on local training and library resources, available funding, and the larger library training context. But as noted above, there are a few options you can explore. You may decide to work with library staff members who are experienced trainers in the library field, professional trainers from outside the library field, or a combination of both. Below is a description of types of trainers and a few considerations to keep in mind when thinking about training delivery.

OPTION ONE: LIBRARY TRAINERS

Trainers who already work in the library field have the significant advantage of being familiar with the training participants, are likely to be more knowledgeable about library funding and organizational structures, and to have contacts in libraries to call upon when needing to learn more. Assuming they have the required training skills, they are likely to need less subject matter preparation than trainers brought in from the outside. Also, assuming that these are either library staff themselves, or else trainers employed by libraries, another benefit is that after this advocacy training program ends, there will be trained trainers who can help sustain ongoing advocacy training and integrate it into normal library staff training.

A few important considerations for working with library trainers include the level of skills they have and the kind of training they are familiar with. It is important for the trainers using this curriculum to have experience conducting highly interactive, activity-based trainings. Before deciding to use library trainers, you need to become familiar with exactly what skills the trainer has and what kinds of training they know how to do.

OPTION TWO: OUTSIDE TRAINERS

Involving outside, professional trainers often makes it much easier to find trainers with the training and curriculum development skills needed for this project. Private, professional training providers are the most likely to be using up-to-date training methods and can provide first rate training experiences and learning outcomes for the participants.

A few important considerations for working with professional trainers include the cost and the trainers' knowledge of advocacy or libraries. Though not always the case, outside professional trainers are often more expensive than library trainers. If the trainers are not familiar with either advocacy or libraries, it will likely require time for them to familiarize themselves on both topics before they are ready to perform the training or begin customizing the advocacy training curriculum. And they will likely need more assistance from library experts to ensure the accuracy of the customized training content. There is also the issue of training new advocates or updating training skills in the future, and the fact

that once the training is concluded, outside, professional trainers will no longer be available to the participants; the library system will lose the accumulated skills and knowledge of these trainers and will need to start from the beginning to provide the advocacy training again in the future.

No matter where you find your trainer candidates, be certain you understand their strengths and weaknesses and develop a plan to help selected trainers gain a strong understanding of advocacy and public libraries.

Training the Trainers

As you begin to plan your advocacy training program, one of the early activities we strongly encourage you to consider is training your trainers. No matter how good your trainers are, they will need some level of training in the new advocacy training curriculum. The shape this takes can vary widely. If you are implementing on a small scale and have a small number of trainers already knowledgeable in libraries and advocacy, you may only need an informal process. If you are running a country-wide training program with many trainers, then this should be a formal "train-the-trainer" program. In either case, trainer-training is also an opportunity to pilot-test and revise the customized curriculum.

In the first section of this implementation guide is a description of what you and your trainers will need to know about libraries and library staff, advocacy, and advice on how to obtain that knowledge. As with any other type of training, you will want to first assess your trainers' previous knowledge in these areas. You will also want to assess their familiarity and comfort with interactive, activity-oriented training methods.

If you conduct a training-of-trainers, it should accomplish at least these three goals:
1. Each trainer learns the content of the curriculum and understands his/her role.
2. Each trainer is proficient at the interactive training methods used in the curriculum.
3. The customized curriculum has been fully tested and revised to make it ready to offer training participants.

Whenever possible, we recommend a full training-of-trainers program, where trainers are taught the customized curriculum and can practice and refine the interactive methods. Many who have implemented this curriculum have found it useful to combine training-of-trainers with a pilot of the advocacy training program, with the trainers acting as participants for the first delivery of the curriculum. This allows the trainers to learn at the same time that final refinements are made to the content.

- **Chile's BiblioRedes** team delivered the first round of training to regional teams of library staff who then trained other staff in their region. The training-of-trainers approach improved participants' knowledge of advocacy while also preparing them to teach the curriculum to their local library staff.
- **Indonesia's PerpuSeru** team conducted a training-of-trainers with community-based organizations, using capacity building officers hired from non-governmental organizations as advocacy trainers, in order to give them a solid understanding of the curriculum content and effective training techniques.
- **Ukraine's Bibliomist** team held a second training-of-trainers a year into their program to account for staff turnover and ensure that all new staff were trained. It also served as a way to both facilitate a discussion among trainers about the lessons learned after conducting local-level trainings and to improve trainers' knowledge and skills in specific advocacy topics.
- **EIFL (Electronic Information for Libraries)**, an international non-governmental organization that works to increase access to knowledge in developing and transitioning countries, encourages their advocacy trainers to observe a training in action before beginning to adapt and implement their own, including planning visits to other countries.
- **Romania's Biblionet** team's program leaders encourage librarian trainers to attend a five-day train-the-trainer workshop even if they have attended the advocacy training as a participant, as understanding of advocacy increases with each subsequent training.

Recommendations for Implementing the Advocacy Training Program

The *Turning the Page* advocacy training curriculum and supporting materials have been developed to serve as a flexible-format training curriculum that you can use to implement a successful advocacy training program. As written, the 15 training sessions comprise more than 20 hours of training. It can be offered to participants all at once in three to four consecutive days; as a regularly scheduled multi-week course; as intermittent full or partial day sessions throughout the year; or in any number of online or blended in-person and online combinations. Piloting the training can give you tangible experience with what works and what doesn't.

DELIVERY TIMING AND FORMAT

Each training program coordinator will need to work with his or her trainers and leaders of the target libraries to develop an appropriate training approach based on the assessment they conduct of the participants' training needs, their own capacity to provide the training via different modes, and the existing financial and logistical constraints. Working together, you will identify the best training

format or formats for your particular situation. Each delivery method and scheduling approach offers different advantages and challenges. Here are some examples of options chosen by organizations that have implemented advocacy training programs based on the *Turning the Page* training curriculum.

All at once—conference style

- The **Biblionet** team in **Romania** conducts its training as a one-time, in-person event.
- The **Sesigo** team in **Botswana** conducts in-person trainings and customizes them for different participants. For example, library directors who are responsible for implementing advocacy plans attend a 4-day training that includes motivational speakers from government and university leadership, while other library staff attend a one-day training with a streamlined set of advocacy sessions.

Modified conference style with a break between sessions

- The **PMU "Improvement and Computer Usage and Public Internet Access in Vietnam"** team in **Vietnam** divides the training into two parts as a way to help participants retain the lessons—all participants start with a full day of basic advocacy training and then participate in a half day follow-up training three months later, focusing on applying practical skills. Staff are asked to practice using their advocacy skills and tools through four events: an Internet festival; two partnerships with local groups; and engagement of student volunteers.
- The **Library Development Program** team in **Poland** conducts its training in phases. The training is divided into two two-day segments. The first part is based on this advocacy training curriculum, adjusted to the local context. The second part is the public speaking session, allowing library staff to practice the advocacy messages they developed in the first part of the training. Dividing the training into two parts is necessary for practical reasons, as it is very difficult for library staff to leave their homes and jobs for four days, but serves the added benefit of giving library staff time to put lessons from the training into practice.

Online delivery

- **The U.S. Public Library Association** translated its two-day in-person advocacy training to a six-week program conducted online through hosted webinars, live networking, and participant homework.

Blended online and in-person instruction

- The advocacy training that the **BiblioRedes** team in **Chile** developed has been incorporated into a six-month accredited course that is conducted online and coordinated through a private university. Regional training teams conduct in-person meetings with program participants to follow up on how the training lessons are being implemented.

This is just a small sample of the different ways advocacy training can be arranged and scheduled. We recommend that you talk to as many of the stakeholders involved in the training as possible before deciding on a training delivery strategy and schedule.

Advocacy Training Program Evaluation

WHY EVALUATE?

Evaluation of your advocacy training program is vital to understanding its effectiveness and to making improvements. There are often misperceptions of evaluation—that it is difficult to do, too time consuming, or too expensive. For these and other reasons, evaluation is often viewed as unnecessary or is tacked onto the end of a program as an afterthought. In truth, when you integrate an evaluation process into your advocacy training planning from the start, you can quickly and easily get valuable feedback about your training efforts that will help you make improvements and track its success. In short: if you start the whole planning process of creating your training program by answering, "what does success look like?," you can easily begin to think about how you measure how successful your advocacy training program was, and where you can focus your resources in the future to make it even more successful.

Some of the primary reasons to evaluate the advocacy training program include:
- **Improving Delivery**: Evaluation gives trainers direct feedback about the effectiveness of the training content or methods. This helps them improve the learning experience and outcomes for future participants. It also helps them understand the impact of the logistics or learning experience participants had at the training.
- **Measuring Impact**: Evaluation shows trainers and training program coordinators whether the program has achieved the learning objectives: not only knowledge gained, but also how participants use that knowledge to further their advocacy goals.
- **Demonstrating Value**: Using evaluation, you can assess the overall impact of training, demonstrate its strategic value, and solicit future investment for continued support of advocacy trainings.

To help you set up and implement your own training evaluation plan, this section walks through some simple steps and resources for incorporating evaluation into your advocacy training program.

EVALUATING THE ADVOCACY TRAINING PROGRAM GOALS

As highlighted earlier, the *Turning the Page* training program is designed to achieve five goals:

1. Improve participants' **fundamental knowledge** of advocacy for public libraries.
2. Improve participants' **use of tools and strategies** for conducting advocacy on behalf of public libraries.
3. Increase participants' **confidence** in being able to advocate on behalf of public libraries.
4. Improve participants' ability to develop, implement, and manage a comprehensive **Advocacy Action Plan**.
5. Spread advocacy **best practices** into other aspects of participants' libraries.

Evaluation sets the indicators of achievement for each of these goals. For example, in order to assess and measure whether a training participant's fundamental knowledge about public library advocacy has increased, we will ask participants to "identify three ways in which advocacy is important to libraries."

Evaluation is an iterative process, which may be used to continuously improve all aspects of your overall training program. Some results (e.g. from Session Feedback Forms) can be applied by trainers immediately after each training session, making improvements in trainer performance, training methodologies, and the learning experience of participants. Other results will be analyzed and implemented over time. Training program coordinators should plan to look at the aggregate evaluation results at regular intervals, such as quarterly or semiannually, to inform decisions to adjust the training program overall or in key areas. For a deeper investigation into evaluation theory, read the Kirkpatrick Model of Training Evaluation cited in Appendix Three.

STEPS TO INCORPORATE EVALUATION INTO YOUR ADVOCACY TRAINING

When done well, the evaluation process yields powerful data to inform decision-making about how to make the most of library resources for maximum impact. There are a few recommended phases or steps for conducting advocacy training evaluation, outlined below. While grantees of the Bill & Melinda Gates Foundation are expected to use a comprehensive set of evaluation tools and assessment surveys, we have included some suggestions for training program coordinators who are looking for simpler ways to conduct training evaluation.

STEP 1: Pre-training Assessment. Before the start of your advocacy training program, you will need to establish a baseline of each participant's knowledge, skills, and confidence around advocacy. Knowing where participants are starting from will help trainers and training program coordinators modify the training content and facilitation to match the needs of the training participants. It also allows you to accurately measure the effectiveness of the training program and how much the participants have learned by participating in the training. There are a few different ways you can conduct a pre-training assessment:

- To get the most value from the assessment, it should be conducted before or during the curriculum customization process. For instance you might include assessment questions as part of the registration process for the advocacy training program, using an online survey method like SurveyMonkey (www.surveymonkey.com) or another website.
- If you are unable to do the assessment before training starts, ask participants to complete written assessment questionnaires as part of the introductory session of the advocacy training. While this is still useful to track the success of the advocacy training, it reduces the value of the assessment because the trainer misses the opportunity to gather information about participants in advance and adjust the training to suit their needs.

STEP 2: Advocacy Training Session Feedback. A training Session Feedback Form is another helpful evaluation tool for measuring participants' reaction to the training. This form allows participants to provide immediate feedback on the session content and the training delivery at the close of each training session when the experience is fresh in their minds. This information can help trainers adjust their approach in real-time and gives training program coordinators information on structuring the training as a whole.

STEP 3: Post-training Assessment. At the conclusion of the advocacy training program, ask the training participants what they have learned as a result of participating in the advocacy training. This data allows you to measure if short-term improvement in advocacy skills, knowledge, and confidence has been achieved. You can also measure participants' intentions for action: how likely participants think they are to conduct advocacy and/or to apply what they have learned to their work.

Results from the post-training assessment will be useful for trainers (to gauge the success of their efforts at teaching the concepts in the advocacy training) and training program coordinators (to measure the success of the advocacy training program). Taken together with the *pre-training assessment* responses (Step 1, above), *post-training assessments* give you the information you need to measure the change in participants' knowledge or skill as a result of the training. A few examples for conducting a post-training assessment include:
- Asking advocacy training participants to complete a written evaluation following the final session of the training.
- Conducting a "wrap-up" or closing session at the end of the training that combines a written evaluation with group questions and an interactive discussion that is captured and recorded by the trainers.

A word of caution: when comparing pre-training assessment responses (Step 1) with post-training assessment responses (Step 3), you need to ask the same questions (or very similar questions) in both steps, so you can accurately compare the two sets of data in a fair and unbiased way.

STEP 4: Long-term Post-training Assessment. While the post-training evaluation (Step 3) measures *intentions*, long-term post-training assessment is necessary to gauge whether those *intentions* were turned into *action*. To find out whether participants have retained the knowledge they gained during the advocacy training and put the knowledge and skills learned into practice, you should conduct an assessment three or more months after the advocacy training has been completed. This also helps you maintain a connection with training participants and support their advocacy efforts.

Long-term evaluation will require additional time, planning, and effort; however it may yield extremely valuable results. Trainers are encouraged to stay involved in the evaluation process, but this part of the evaluation will be most important to training program coordinators. Examples of how a long-term post-training assessment can be conducted include:

- Circulating a questionnaire to participants as an online survey—following up once or twice with advocacy training participants to remind them to complete the survey.
- Organizing local library leaders to conduct one-on-one interviews with training participants.
- Providing incentives to participants who re-engage (e.g. review their advocacy plans or additional learning opportunities).
- Combining the assessment with other outreach to training participants (e.g. when sharing advocacy resources and updates).

AVAILABLE RESOURCES

We have developed streamlined questionnaires: one for pre-training (Step 1), one to gather feedback from participants after each training session (Step 2), one for post-training (Step 3), and one for long-term post-training (Step 4). These are included in Appendix One of this implementation guide. Appendix Three also includes a few resources on evaluation.

We encourage everyone who uses the advocacy training curriculum to share results from their evaluation. By analyzing responses to these same questions from communities around the world, we will get a comprehensive picture of the value and impact of the *Turning the Page* advocacy training program.

Maintaining Momentum After the Training

When it comes to influencing policy and funding decision-makers on behalf of public libraries, your work is never finished; it is ongoing. You will need strategies to sustain the momentum advocacy training participants feel and the skills they gain through the training program. When organizing the training, be sure to set expectations early for the continuous effort and learning that participants will engage in beyond the advocacy training program, and share tools and resources that they can use for ongoing advocacy work.

For example, encourage advocacy training participants to:
- Maintain the relationships and networks they gain during the training— these fellow library leaders and staff can give them ideas and support for their ongoing advocacy.
- Continually expand their own skills and learning after the training is over, and offer specific opportunities and tools that can help them do this.
- Spread knowledge to colleagues not involved in the initial training, including presenting the training themselves.

When the lessons learned in the training are sustained, you will see more effective advocacy—which in turn will contribute to the sustainability of your libraries and the services they offer, through increased awareness, community support, and funding.

Poland's Library Development Program team formulated this sustainability statement to guide their planning: "We believe ensuring sustainability of our impact is a horizontal principle and must be included in the planning and implementation of all activities undertaken within our program."

APPROACHES FOR BUILDING ADVOCACY SKILLS AND MOMENTUM

Below are a few straightforward ways to help your training participants stay connected and focused on improving their skills and implementing successful advocacy plans.

Advocacy Action Plan Workbook: The workbook provides the key steps to take in current and future advocacy efforts, and is a tool that can and should be used repeatedly. Following the initial training, the goals and steps participants have defined in their workbooks will guide them in putting their new skills into practice. Returning periodically to the workbook template to define new advocacy goals will refresh those skills and sustain ongoing advocacy efforts. Encourage participants to stay attuned to significant changes that might trigger the need to re-engage with the advocacy planning process, such as new members on their advocacy team, changes in key partnerships, major impacts to their proposed timeline, new target stakeholders and influencers, or unexpected

economic shifts that could affect library funding. Also look for incentives that will urge training participants to implement and/or revisit their Advocacy Action Plans at regular intervals.

- Example: Two months after their training ended, in **Latvia's Father's Third Son** program, the training organizers offered participants an additional optional session that focused on the Advocacy Action Plans developed by participants both during and after the training. This gave participants a chance to talk through their advocacy plans with their peers and to ask questions of the trainers. The Latvia team found that even participants who had not started to develop or implement their plans attended this optional session to hear about their colleagues' experiences.
- Example: In **Lithuania's Libraries for Innovation** program, training participants were offered an incentive to develop their advocacy plans. For those who developed their plans within a set amount of time, advocacy trainers were available to provide free, private consultation.

Online Community: Develop an online community where library staff from around the country or region can access resources and discuss ideas and best practices in online forums. You can build from the original group of training participants and include others in your community or region.

- **Low-cost**: Free and popular social media networks, like DGroups, Facebook, Yahoo, or Google Plus make it easy to start groups and invite participation. Finding connections with other libraries and staff on the topic of advocacy can improve individual motivation and incubate innovative ideas across the group.
- **Advanced**: The **Glob@lLibraries Bulgaria** team developed an online portal www.Glbulgaria.bg, to serve as a networking site and one-stop information source for library staff. Library staff were trained on how to post news and information about their library's activities. They can also visit the site to access slide shows and presentations with lessons learned, videos, and pictures from key meetings. A map was created that pinpoints every library and *chitaliste* (a Bulgarian institution that includes a library and functions as a community center with cultural activities) in the country, and provides a brief description of each library and its cultural space (e.g. a stage where artistic performances can be held). The online portal has been so effective that some library staff are more active on the portal than on Facebook.

Online Follow-up Training: Plan a series of post-training webinars to refresh advocacy topics and to introduce new speakers and ideas. Webinars are presentations that are delivered online. Often they engage participants through a shared screen and audio, walking through important content, answering questions (either written or verbal) from participants, and engaging in group conversation.

There are many elements that go into delivering successful webinars. You can learn a lot about best practices by observing any of the series of webinars on www.WebJunction.org (registration is free). Some general guidelines include:

- *Prepare the presenters ahead of time by reviewing their presentation materials, offering recommendations for clarity of their visual components, and doing a live orientation session to familiarize presenters with the web conferencing technology.*
- *Plan to have a webinar producer introduce the session and the presenter(s), moderate the questions from the audience, and close the session.*
- *Ideally, there will be someone who is solely focused on providing technical support to attendees so that technical issues such as audio and connection problems don't interrupt the presentation.*
- *Encourage attendees to login at least 15 minutes early to check their technical connections and to view a series of slides orienting them to the web conferencing platform.*

Mentoring and Peer Learning: Library leaders and staff who have participated in the *Turning the Page* training program are in a strong position to share their learning with others and to work together to extend their learning. This has the two-fold effect of extending advocacy knowledge widely to others and of solidifying this knowledge in the person who is doing the teaching.

- Mentoring implies a long-term relationship for supportive learning, and suggests that one person has knowledge to share with the mentees. It may occur in individual one-on-one sessions or in groups. There are excellent resources for developing mentoring relationships on WebJunction.org; search for "mentoring" to find guidelines, a bibliography, a Mentoring Workbook, and more.
  - o Example: Following train-the-trainers in the **Glob@lLibraries Bulgaria** program, graduates were assigned a supervisor or coach to help them as they began implementing their Advocacy Action Plan.
- Peer learning may take many forms. It can be as simple as asking people to choose an "advocacy buddy" with whom they can share ideas, challenges, and progress. Or it may be a more structured series of peer informational sessions focused on a variety of topics. In peer working groups, participants support each other to reaffirm what they learned in the advocacy training and to extend the learning to others who did not have the opportunity to attend.
  - o Example: Peer learning can also be on a programmatic level, not just a participant level. **Moldova's Novateca** team invited their Romanian colleagues to share expertise for developing more dynamic training methodologies that increase the participation and

motivation of library staff. Coming from a similar culture, the Romania team was able to share insights and offer advice on addressing common problems. In addition, the Romania team participated in Moldova's advocacy trainings themselves to share practical examples of how librarians in their countries reached target audiences, developed messages, worked with media, and shared successes.

Professional Networks: Cultivate professional networks of library managers, librarian trainers, consultants, and library staff whose members can support each other, collaborate on projects, discuss new or evolving needs, and work together to solve problems. Engaging a network of committed partners distributes the responsibility and accountability for ensuring ongoing support for advocacy efforts in libraries.

- Example: **Romania's Biblionet** team is finalizing the accreditation of the advocacy curriculum through the National Association of Public Libraries and Librarians, so the advocacy training could be officially "owned" by the association and its members, and librarian advocacy trainers or libraries could be paid to conduct advocacy workshops in their communities.

LOCALIZING AND CUSTOMIZING THE CURRICULUM

As previously mentioned, the *Turning the Page* curriculum is presented as a foundation on which to build an effective advocacy training program for local library staff. In addition to translating all materials into relevant languages, customization of the curriculum to match local situations and participant needs is expected and highly encouraged.

You will want the customization and localization of the curriculum to be a collaborative effort, bringing together the trainer and training program coordinator with library and advocacy experts.

Your customization will be based on what you have learned about libraries and library staff in your location, about advocacy practices, and about your prospective participants from the pre-training assessment. (See page 22 for more information about the pre-training assessment.)
Your goals for customizing the training curriculum should include:

1. Developing an advocacy training agenda that considers how libraries where you live are organized and funded, as well as the social and legal contexts for library advocacy.
2. Expanding, streamlining, or focusing only on key sessions to best enhance the skills and knowledge of your participants as indicated in the pre-training assessment.

3. Adding local examples and developing locally-relevant discussions and activities to fit local needs.
4. Tailoring the training and delivery to meet the specific needs and capacity of the training participants.
5. Translating all materials.

As you begin this process, we recommend that you start by reviewing how whole sessions apply to your country and local context. Then, we suggest that you work your way through to the details of making specific changes in emphasis and content to match the needs of a particular group of participants.

Reviewing the Sessions

We believe all 15 sessions are valuable and build on each other in a way that creates the foundation for participants to become strong and effective advocates for their libraries. However, we understand it is not always possible to deliver the entire curriculum. If you can only deliver part of the curriculum, we strongly suggest conducting at least the following core sessions that are essential to building the knowledge and skills that every participant must have to be well prepared to advocate for their library:
- Value of the Public Library
- Defining Advocacy
- Developing Your Advocacy Goal
- Identifying Target Audiences
- Creating Library Advocacy Messages

If you lack time or resources to deliver all sessions, start with these and add additional sessions based on what you know about the particular needs of your training participants.

Customizing the Sessions

Once you know which sessions you will deliver, we recommend that you follow the process outlined below to customize each session to fit your local needs. If yours is a non-English speaking country, this is often most efficiently done at the same time as translating the sessions.

Start by studying the original session content. Use the Localization recommendations found in each lesson plan as a guide to the kinds of changes you might want to make for each session. The Localization section gives specific suggestions for customizing that particular topic. You will also likely find that the amount of customization that is needed will vary considerably from one topic to the next.

Be certain throughout this process that you are relying as much as possible on accurate information about the knowledge, skills, experience, job roles, and background of your training participants. The pre-training assessment questionnaire will be a great help in this process.

Here are some general points to consider when customizing any of the sessions.

ADD EXAMPLES, STORIES, AND CASE STUDIES

Examples and stories of others successfully using the concepts, skills, and strategies being described is one of the most powerful and effective ways to increase understanding and motivate participants. These examples should be primarily, but by no means exclusively, from libraries. While a story involving a library similar to that of the local participants is the easiest to relate to and hardest to dismiss, there is often great value in stories from other sectors of public life, or even taken from literature, folk tales, and popular culture. When looking for examples, there are two major categories to consider (more information on collecting stories can be found in Appendix Two):

- *Local Examples*: Where possible, use local examples that participants can most readily relate to in order to make the training more relevant. During the customization process, talk to library staff as much as possible to discover and incorporate these local examples. Trainers should also ask for local examples offered by participants during training discussions so that they can add those examples to future trainings.
- *Examples from Other Countries*: It is also useful in many cases to share examples from other nearby or even distant countries. These can help when trying to illustrate concepts and strategies that are not well used or understood locally. Examples from nearby countries can still be relatable if participants view libraries in those countries as similar to their own. On the other hand, examples that describe libraries in countries around the world struggling with the same issues and engaging in advocacy on behalf of their libraries can significantly help validate the concepts and approach you are teaching.

PRIORITIZE SESSION CONTENT

All sessions already include a significant amount of material. As you customize the content, you may choose to emphasize or add more activities and discussion to sessions that are especially important or challenging for your participants. Making these adjustments may lengthen the amount of time each session will take. To help trainers manage their time in these situations, consider highlighting which content is most crucial for trainers to cover, and which is helpful but "optional."

REQUIRE PARTICIPANT WORK OUTSIDE TRAINING SESSIONS

Another way to shorten training time, or to accommodate more content in the training, is to identify places where participants can complete pre-training work in advance of the training, or outside work between sessions. This work may take the form of extra readings, completing sections of the Advocacy Action Plan Workbook, or practicing presentation skills. If requiring participants to complete outside work, remember to leave time in the next session to discuss the outside work participants did, or weave that work into particular discussions or group activities during training.

REINFORCE THE IMPORTANCE OF TEAMWORK

Teamwork is essential for all advocacy projects and it is important that participants consider ways they can work together with other staff at their libraries to make their advocacy work successful. The concept of teamwork should be emphasized throughout the training as a way to the increase the efficiency and effectiveness of an advocacy project.

Adapting to Specific Participants

Depending on the scope of your advocacy training program, you may wish to create a standard, master version of the customized curriculum that is relevant for all the locations where you will train, and then create more targeted versions customized to specific, local needs as those situations arise. To the extent possible, allow the individual trainer to further adapt the curriculum and its delivery for the needs of the participants they are training. Encourage trainers to find out as much as they can about participants through pre-training assessments, interviews with library leaders or informal observation, and select the sessions that best fit what participants need to learn.

CREATING VERSIONS FOR DIFFERENT LIBRARY AUDIENCES

Most commonly, participants are grouped by geographic location, but you may find it makes sense to segment the participants by job or role, delivering separate workshops to frontline library staff, library directors, librarian trainers, or members of a national library association. In a large scale program that involves libraries of significantly different size or type, you may also require versions of the curriculum for different categories of libraries.

Individual staff roles, existing skill sets, relationships to the local governments, and social norms and expectations all may vary significantly for staff in different positions, or between a small rural library and a large regional system in an urban area. The relative amount of time needed for different topics will vary considerably, and even your examples and activities may need to change.

ADJUSTING TRAINING APPROACH DURING THE TRAINING

Encourage trainers to get to know as much as possible about the participants and their libraries both before and during the training. The more the trainer understands the participants, the more effective the training can be.

Here are some key pieces of information that trainers should know about training participants.

- What is their understanding of how their public libraries are funded?
- What is their understanding of and experience with advocacy?
- What roles do they play within the library, and what are their job responsibilities?
- How well do the participants know each other?
- Do they have initial concerns about the training?

It is important to remember that advocacy is a topic that sometimes makes people feel nervous or uncomfortable—especially library staff, who are traditionally not accustomed to advocating for the library as part of their job. Therefore trainers should take special care to gauge participants' sensitivity to the subject. Creating a safe, supportive atmosphere for the training will help participants feel more comfortable engaging deeply in the experience and sharing ideas with their colleagues. Using the Session Feedback Form, especially at the end of the day or other break in training, can allow the trainer to adjust the training to the feedback received from participants.

TRAINING FOR NON-LIBRARY STAFF

While the *Turning the Page* curriculum is primarily designed for training local library staff, the content may be of benefit to a variety of audiences. Think broadly about other stakeholders who might be significant players in the library's advocacy efforts. You may want to customize different versions of the curriculum to address the particular perspectives of each audience. Including stakeholders from outside of the library in the training should reflect how libraries and related social service providers are organized within a country. Training audiences beyond library staff can help people outside libraries become library champions and better understand the importance of partnering with libraries.

Examples of potential non-library audiences:

- In **Lithuania**, the **Libraries for Innovation** team offered its training program in two-day periods. One day was for library directors together with journalists and business people; the second day was for all library staff.
- In **Vietnam**, the **PMU "Improvement and Computer Usage and Public Internet Access in Vietnam"** advocacy team offered two tracks of training—one for managers of agencies in charge of public libraries at the provincial level, and the other for library staff. It was also important to include participants from the Cultural Post Offices (CPOs) in the advocacy

training. The CPO's operate in smaller-size communities and offer access to technology similar to public libraries.

- In **Romania**, the **Biblionet** team organized a three-day advocacy training using their customized version of the training curriculum, which features a "whole-system-in-the-room" methodology to encourage collaborative and innovative approaches to advocacy. The training participants represented the "whole system," including librarians, local government representatives, and media managers. This approach also helps grantees identify potential library supporters.

Conclusion and Acknowledgements

This version of the *Turning the Page* curriculum and supporting materials was made possible thanks to the input of library programs and individuals throughout the world, who have shared their experiences using the curriculum and setting up their advocacy training programs and who have dedicated their time and expertise to its development and review.

COUNTRIES AND GRANTEES WHO HAVE USED THE CURRICULUM

Since 2011, this advocacy training curriculum has been used by the following countries and programs, whose feedback and recommendations based on their experiences helped inform this latest version:

Botswana (Sesigo)
Bulgaria (Glob@lLibraries Bulgaria)
Chile (BiblioRedes)
Colombia (Ministerio de Cultura-Biblioteca Nacional de Colombia)
Greece (Veria Central Public Library)
Indonesia (PerpuSeru)
Latvia (3td—Father's Third Son)
Lithuania (L4I—Libraries for Innovation)

Moldova (Novateca)
Poland (Library Development Program)
United States of America (The Public Library Association)
Romania (Biblionet)
Turkey (GL-Turkey Project)
Ukraine (Bibliomist)
Vietnam (PMU "Improvement and Computer Usage and Public Internet Access in Vietnam")

CURRICULUM REVIEW COMMITTEE

We are particularly thankful for the time and counsel provided by the advocacy and training specialists who formed the Curriculum Review Committee:

Tshepo Maswabi, Advocacy and Outreach Specialist, Botswana
Marina Giareni, Master Trainer, Future Library, Greece
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Małgorzata (Gosia) Dąbrowska, Media Relations Specialist, Poland
Jacek Krolikowski, Training Specialist, Poland

We wish you well as you now embark on this important training. Global Libraries and our grantee community hope that you will also share what you learn after using this curriculum.

APPENDICES

Appendix One: Advocacy Training Evaluation Tools and Questionnaires

PRE-TRAINING ASSESSMENT QUESTIONS

HOW WOULD YOU RATE YOUR UNDERSTANDING OF THE CONCEPT OF ADVOCACY?	*Circle one:* 1. I don't know what advocacy is 2. I have heard the term, but couldn't define it 3. I am familiar with the concept of advocacy 4. I am comfortable with the concept of advocacy 5. I am confident in my understanding of advocacy
HOW WOULD YOU RATE YOUR ADVOCACY SKILLS AS OF TODAY?	*Circle one:* 1. Novice advocate 2. Beginning advocate 3. Average advocate 4. Advanced advocate 5. Expert advocate
HOW WOULD YOU RATE YOUR CONFIDENCE IN YOUR ABILITY TO ADVOCATE ON BEHALF OF YOUR PUBLIC LIBRARY TODAY?	*Circle one:* ← 1 2 3 4 5 6 7 8 9 10 → Highly doubtful of my ability to advocate for my library Neither doubtful nor confident in my ability to advocate for my library Very confident in my ability to advocate for my library

WHAT ARE THREE THINGS YOU ARE MOST EXCITED TO LEARN FROM THIS TRAINING PROGRAM?

    1.

    2.

    3.

WHAT ARE THREE THINGS YOU ARE NOT EXCITED ABOUT REGARDING PARTICIPATION IN THIS PROGRAM?

1.

2.

3.

PLEASE INCLUDE ANY ADDITIONAL COMMENTS IN THE SPACE BELOW:

POST-TRAINING ASSESSMENT QUESTIONS

HOW WOULD YOU RATE YOUR UNDERSTANDING OF THE CONCEPT OF ADVOCACY?	*Circle one:* 1. I don't know what advocacy is 2. I have heard the term, but couldn't define it 3. I am familiar with the concept of advocacy 4. I am comfortable with the concept of advocacy 5. I am confident in my understanding of advocacy
HOW WOULD YOU RATE YOUR ADVOCACY SKILLS AS OF TODAY?	*Circle one:* 1. Novice advocate 2. Beginning advocate 3. Average advocate 4. Advanced advocate 5. Expert advocate
HOW MANY NEW TOOLS OR SKILLS DID YOU LEARN/LEARN ABOUT AS A RESULT OF PARTICIPATING IN THIS ADVOCACY TRAINING PROGRAM?	*Circle one:* 1. None 2. One or two 3. Three to five 4. Five to ten 5. More than ten

HOW WOULD YOU RATE YOUR CONFIDENCE IN YOUR ABILITY TO ADVOCATE ON BEHALF OF YOUR PUBLIC LIBRARY TODAY?	*Circle one:* ← ──────────────────────────────── → 1 2 3 4 5 6 7 8 9 10 Highly doubtful of my ability to advocate for my library Neither doubtful nor confident in my ability to advocate for my library Very confident in my ability to advocate for my library
AT THE END OF THIS TRAINING, I (OR MY LIBRARY TEAM) HAVE EITHER COMPLETED WRITING AN ADVOCACY ACTION PLAN OR WILL COMPLETE IT WITHIN THE NEXT WEEK.	*Circle one:* 1. Yes—I/we completed writing our Advocacy Action Plan 2. No—I/we did not complete writing our Advocacy Action Plan but will within the next week 3. No—I/we did not complete writing our Advocacy Action Plan and will <u>not</u> complete within the next week

WHAT ARE THREE THINGS YOU ARE MOST EXCITED TO IMPLEMENT AS A RESULT OF PARTICIPATING IN THIS TRAINING PROGRAM?

    1.

    2.

    3.

WHAT ARE THREE THINGS YOU ARE STILL NOT EXCITED ABOUT REGARDING ADVOCACY ON BEHALF OF YOUR LIBRARY, DESPITE HAVING ATTENDED THIS PROGRAM?

    1.

    2.

    3.

PLEASE INCLUDE ANY ADDITIONAL COMMENTS IN THE SPACE BELOW:

LONG-TERM POST-TRAINING ASSESSMENT QUESTIONS

HOW WOULD YOU RATE YOUR UNDERSTANDING OF THE CONCEPT OF ADVOCACY?	*Circle one:* 1. I don't know what advocacy is 2. I have heard the term, but couldn't define it 3. I am familiar with the concept of advocacy 4. I am comfortable with the concept of advocacy 5. I am confident in my understanding of advocacy
HOW WOULD YOU RATE YOUR ADVOCACY SKILLS AS OF TODAY?	*Circle one:* 1. Novice advocate 2. Beginning advocate 3. Average advocate 4. Advanced advocate 5. Expert advocate
AS A RESULT OF THE ADVOCACY TRAINING, HOW MAY TOOLS OR SKILLS HAVE YOU USED/ARE YOU USING TO CONDUCT ADVOCACY FOR YOUR LIBRARY?	*Circle one:* 1. None 2. One or two 3. Three to five 4. Five to ten 5. More than ten
ONE A SCALE OF 1 TO 10, WITH 1 BEING LOWEST AND 10 BEING HIGHEST, WHERE DO YOU RATE YOUR CONFIDENCE IN YOUR ABILITY TO ADVOCATE ON BEHALF OF YOUR PUBLIC LIBRARY TODAY?	*Circle one:* ⟵ 1 2 3 4 5 6 7 8 9 10 ⟶ 1 = Highly doubtful of my ability to advocate for my library 5 = Neither doubtful nor confident in my ability to advocate for my library 10 = Very confident in my ability to advocate for my library
AS OF TODAY, I (OR MY LIBRARY TEAM) HAVE COMPLETED WRITING AND BEGUN TO IMPLEMENT AN ADVOCACY ACTION PLAN.	*Circle one:* 1. No—I/we did not finish writing our Advocacy Action Plan 2. Yes—I/we have finished writing our Advocacy Action Plan, but haven't implemented it yet 3. Yes—I/we have finished writing our Advocacy Action Plan, and have begun to implemented it 4. Yes—I/we have finished writing our Advocacy Action Plan, and have even completed implementing it

AS A RESULT OF IMPLEMENTING YOUR ADVOCACY ACTION PLAN, HAVE THERE BEEN ANY NEW PARTNERSHIPS ESTABLISHED AS A RESULT OF YOUR ADVOCACY EFFORTS? IF SO, HOW MANY?	*Circle one:* 1. None—We haven't implemented our Advocacy Action Plan yet 2. None—We've completed our Advocacy Action Plan but no ongoing partnerships have developed 3. Yes—One individual and/or group has become a partner 4. Yes—Between two and five ongoing partnerships with an individual or group have developed 5. Yes—More than five ongoing partnerships with an individual or group have developed

WHAT ARE THREE WAYS IN WHICH THIS TRAINING PROGRAM HAS IMPACTED YOUR LIBRARY? OR, WHAT HAS HAPPENED TO YOUR LIBRARY SINCE PARTICIPATING IN THE PROGRAM?

1.

2.

3.

WHAT ARE THREE WAYS IN WHICH THIS TRAINING PROGRAM HAS IMPACTED YOU PERSONALLY? OR, WHAT HAS HAPPENED TO YOU SINCE PARTICIPATING IN THE PROGRAM?

1.

2.

3.

PLEASE INCLUDE ANY ADDITIONAL COMMENTS IN THE SPACE BELOW:

SESSION FEEDBACK FORM

In order to improve our training sessions, we want your feedback. Please answer the following questions as honestly as possible.

Your feedback will be used to modify future training sessions. Thank you!

I.	Please mark your response to the following statements:	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
1.	Overall, I enjoyed this training session					
2.	Overall, this training session met my expectations					
3.	Overall, the training materials/ activities helped me to learn the content					
4.	Overall, the facilitator(s) knew the training content					
5.	Overall, the facilitator(s) managed the session well					
6.	I will be able to do my job better as a result of attending this training session					
7.	I would recommend this training session to others					

II. Three things I <u>liked</u> about this training were:

1. _____

2. _____

3. _____

III. Three things I <u>would change</u> about this training are:

1. _____

2. _____

3. _____

IV. Additional comments:

_____

Thank you for your time and feedback!

Appendix Two: Story Collection

A localized, true story can convey what advocacy means much better than all the policy briefs and facts in the world. Incorporating location-specific success stories during training sessions will allow you to highlight that it is possible to reach specified advocacy goals. We know that finding and developing these stories takes time and resources. Below are some tips to make finding advocacy stories in your community or country easier to accomplish.

FINDING STORIES

Finding successful advocacy stories can be a lengthy process. You should begin identifying and interviewing potential organizations as soon as possible. You may be able to do this through an informal survey of libraries that will be attending the training to see what they've done in the past or by conducting an Internet search to see if any groups have been involved in securing new library funding or supportive-policy. If you are unable to find anyone in the library community who has already engaged in advocacy, consider looking at educational groups and other NGOs in your country that already conduct advocacy.

COLLECTING THE STORY

Once you have identified a possible success story, it is important that you find out as much information as possible about the situation to determine whether or not this story is one that is appropriate to highlight. Ideal stories will have:

- A defined beginning, middle, and end—where a need was identified, a plan developed, and results secured;
- Targeted outreach to elected officials and/or their influencers; and
- Most importantly, results achieved from the advocacy efforts to showcase in telling the story.

DECIDING IF A STORY IS COMPELLING

After speaking with the library staff, you must decide whether their story is the kind of story that you'd like to use in your training. Some questions to ask yourself are: Is this a strong, compelling story? Are there clear results? Will this inspire people who are new to library advocacy? You may decide it is more efficient to use these questions to interview library staff and to write the story yourself.

Keep in mind that these stories not only will serve as a tool in your library advocacy training, but also are a powerful advocacy tool on their own. When facts are combined with a personal narrative, you have the opportunity to elevate the story to a new level, engaging media outlets, policy elites, and library stakeholders with one story.

SAMPLE STORIES

The following are a few examples of advocacy stories:

- From the **BiblioRedes** program in **Chile**: After the mayoral elections in Chile last year, many local government decision-makers changed and public libraries needed to ensure the continuity of library support and funding. BiblioRedes collected data about ICT usage in public libraries, framed it in economic terms (i.e. the market value of those services), and presented the data to the new mayors. It was an effective advocacy strategy.

- From the **Biblionet** program in **Romania**: A law in Romania calls for municipal libraries to provide additional services to the whole county, but does not require the county to allocate any additional funds to provide the services. The Romania program did not set out to raise funds directly, but to build a base of awareness and support for libraries, so there would be a strong national network and public support when libraries later advocated changing the law. Libraries conducted outreach through volunteers and hosted community meetings to communicate the benefits of the public library. The result was national advocacy action, a positive response from the Minister of Culture, and a change to the wording of the law to require additional funds for the library.

- From the **Bibliomist** program in **Ukraine**: A library from Bilozerka organized a letter-writing campaign to prevent the local government from closing the library. The library reached out to community members, the national library association, and library partners with a request to send letters to the local government and argue that the library is important for the community. In a week, they collected over 300 letters of support and the library was not shut down. The library director had previously attended advocacy training at a regional training center.

Appendix Three: Resources for Trainers

Whether you are a professional trainer looking to deepen your knowledge of advocacy or a library leader interested in learning more about training program management and evaluation, curriculum development, and training methodologies, the following list should help direct you.

TRAINING PROGRAM MANAGEMENT

1. Nilson, C. (1999). *How to start a training program*. Alexandria: ASTD.
2. Public Administration Leadership and Management Academy. (2008). *Public sector capacity development training of trainers programme*. Retrieved from: www.amdin.org/documents/d00104/

USING COMPETENCIES AND DEVELOPING CURRICULUM

3. Rothwell, W., Graber, J. (2010). *Competency-based training basics* (ASTD Training Basic Series). East Peoria: Versa Press, Inc.

TRAINING NEEDS ASSESSMENT

4. Barbazette, J. (2006). *Training needs assessment: Methods, tools, techniques* (skilled trainer). San Francisco: Pfiefer.
5. Brown, J. (2002). *Training needs assessment: A must for developing an effective training program.* Public Personal Management, 31:4, 569-578.
6. Gupta, K. (2007). *A practical guide to needs assessment* (essential knowledge resource). San Francisco: Pfiefer.
7. Strouse, R. (2002). *GL Toolkit: The why and how of needs assessment.* Burlingame: Outsell, Inc.

TRAINING METHODS AND INSTRUCTIONAL DESIGN

8. Colvin Clark, R. (2010). *Evidence-based training methods: A guide for training professionals.* Danvers: ASTD Press.
9. Stolovitch, H., Keeps, E. (2011). *Telling ain't training*. Danvers: ASTD Press.
10. Wlodkowski, R. (2008). *Enhancing adult motivation to learn: A comprehensive guide for teaching all adults*. San Francisco: Jossey-Bass.

TRAINING PROGRAM EVALUATION

11. Kirkpatrick, D. (1996). *Great ideas revisited. Techniques for evaluating training programs. Revisiting Kirkpatrick's four-level model*. Training and Development, 50:1, 54-59.
12. McCain, D. (2005). *Evaluation basics* (ASTD training basics). Danvers: ASTD Press.

13. Phillips, J., Stone, R. (2002). *How to measure training results: A practical guide to tracking the six key indicators.* New York: McGraw Hill.

ADVOCACY

The Global Libraries Advocacy Guide provides a step-by-step overview of the advocacy process that is a valuable supplement to the information provided as part of the *Turning the Page* curriculum and accompanying materials.

Appendix Four: Glossary

The following are definitions of the terms that will be used during the *Turning the Page: Supporting Libraries, Strengthening Communities* advocacy training curriculum.

Advocacy is the actions individuals or organizations undertake to influence decision-making at the local, regional, state, national, and international level that help create a desired funding or policy change in support of public libraries.

An **Advocacy Action Plan** consists of an advocacy goal and objectives, combined with the proposed tactics that will achieve them. An Advocacy Action Plan is not synonymous with an advocacy campaign (described below), as a campaign will often be a component of the overall plan. Improving a participant's ability to develop, implement, and manage a comprehensive Advocacy Action Plan is one of the five main goals of the training program.

The **Advocacy Action Plan Workbook** is a tool that training participants can use to help develop a library Advocacy Action Plan. The Advocacy Action Plan Workbook will be introduced at the beginning of the advocacy training and used throughout the training sessions.

An **Advocacy Campaign** combines a number of advocacy tactics for a specific purpose. When done well, it is an effective way to achieve advocacy objectives and make progress toward your advocacy goal. An advocacy campaign should have a start and end date, a clearly defined audience, and a coordinated, strategic approach.

An **Advocacy Goal** is a desired funding or policy change you seek in support of the sustainability of your library and the services it provides to the community. For example, your library may be providing Internet access, online classes, and CV workshops that the unemployed in your community rely on to prepare for and secure new jobs, but it lacks sufficient computers, staff, or a fast enough Internet connection. Your advocacy goal could be to have the local decision-makers in your community increase the library's annual budget by the percentage that is needed to fund this service.

An **Advocacy Message** is a strong, effective message that can provide people outside of the library with a clear understanding of the library's advocacy goal and a way they could help the library reach that goal. Many of the training sessions are designed to help library staff refine their messages to appeal to different audiences and be as effective as possible.

Advocacy Objectives are the measurable and more immediately achievable milestones that bring you closer to your advocacy goal and provide the structure of your Advocacy Action Plan.

Advocacy Tactics are how you work to achieve your advocacy goal (and objectives). Tactics could be an action (such as holding an open house for policymakers at your local library or distributing information to community leaders); a tool (such as an infographic or video); or an approach (like grassroots organization). In this training, tactics are most often described in broad terms, including categories like communications, outreach, public relations, marketing, branding, or lobbying.

Advocacy Training Sessions are the 15 individual sessions that are included as part of the *Turning the Page* advocacy training program. Each session focuses on a different topic and is designed to help improve a participant's advocacy knowledge and/or skills.

Advocacy Training Agenda is the combination, timing, and order of sessions designed to complement and reinforce one another, and is developed by the training program coordinator.

A **Decision-maker** is an individual in the community, region, or country who has the power to make funding, policy, or other decisions that affect public libraries. These could include, but are not limited to mayors, city council members, county council members, and city or county managers. For the purposes of this training, this term also includes people who have influence over decision-makers—whether they are family members, religious leaders, members of the media, friends, or respected and vocal citizens.

Funding Requests are the formal requests that libraries make for public or private money. The process and structure of these requests varies. For example, a library funding request could be done through a meeting, presentation, grant request, or simply an expanded publically funded budget.

Fundraising when referenced as part of this advocacy training, is the act of raising non-public funds to secure adequate resources for a public library from an individual, organization, business, or trust. Examples include private money raised through events, from businesses, or grants from foundations.

Impact Data refers to the measurement of how people's lives and communities have changed as a result of library programs and services.

Library Leaders refers to people in charge of their library programs, networks, or organizations. Library leaders and directors are important to include in the advocacy training.

Library Partnerships are mutually beneficial relationships that libraries form with likeminded organizations to help support library programs and services, and to help promote the work and value of the library within the community. Examples of partnerships could include working with a local cultural organization, school, faith community, foundation, or business. Library partners can also help library staff with advocacy.

Library Staff, for the purpose of this advocacy training, is used to identify anyone who works at a public library and provides services to the public.

Library Supporters are people and organizations that support public libraries and participate in efforts to improve and promote the public library in their community or country. Library supporters can play a critical role in helping librarians persuade the public about the value of the public library.

Library Perception Information refers to information that describes what your target audience thinks, knows, and feels about the library and the services the library and its staff provide.

Participant, for the purposes of this training, refers to those who attend the advocacy training. This can include library staff and library leaders.

Public Access Technology refers to the tools (computers, Internet connection, and other devices) and support (staff training, one-on-one assistance) that a public library provides to library users.

Target Audience refers to a person or group of people that can help bring about the changes to policies, funding, or partnerships that a public library needs to meet its advocacy goal. Some examples of target audiences include public officials, library volunteers, community-based organizations, and local businesses.

Trainer refers to the individual responsible for conducting the advocacy training. Trainers could include librarian trainers and non-library professional trainers. In addition to conducting the advocacy training, it is assumed that trainers will be involved in the customization and evaluation of the advocacy training.

The **Training Program Coordinator** is the organization or individual responsible for executing the advocacy training program, including managing the hiring and training of trainers, overseeing the curriculum customization process, recruiting training participants, and conducting training evaluation and other follow-up. Training program coordinators may also be trainers themselves.

Appendix Five: Recommended Trainer Competencies

The trainer is the individual responsible for conducting the *Turning the Page* advocacy training. Trainers can include librarian trainers and non-librarian professional trainers. In addition to conducting the advocacy training, it is assumed that trainers will be involved in the customization and evaluation of the advocacy training.

Trainers should understand and be able to apply **basic instructional design principles** (e.g. how to organize the training to effectively share information and engage diverse participants) and **learning theory** (including the various learning styles, adult learner motivations, and techniques of experiential learning) to the design and presentation of the advocacy training curriculum. For trainers unfamiliar with the terms "instructional design" or "learning theory," information about each can be found among the resources listed in Appendix THree.

In addition, effective trainers will be able to:
- Adapt training curricula and materials for relevance to each audience.
- Practice creative and effective training techniques, including interactivity and a variety of approaches to accommodate learning styles and motivate participants.
- Present ideas clearly, concisely, and effectively, and demonstrate a passion for transferring knowledge and understanding to participants.
- Demonstrate passion and knowledge about advocacy, library-related issues and library operations, or both.
- Demonstrate commitment to become more knowledgeable about unfamiliar aspects of libraries and/or advocacy.
- Demonstrate openness to feedback or supervision.
- Plan and prepare for training sessions efficiently, including preparation of the room and materials, as well as gathering information about participants.
- Assume and maintain control during the session, make decisions quickly, address problems or conflicts in training participant groups, and propose effective solutions in a group environment.
- Demonstrate sensitivity, respect, and professionalism, as well as patience and empathy for diverse groups of participants; actively listen to learner input.
- Be an active participant in the evaluation of the training, accept feedback on effectiveness of the training and seek opportunities to improve techniques and behavior.

Appendix Six: Training Curriculum Style Guide

The *Turning the Page* training program will be unique to every trainer based on the specific customization and localization each chooses to apply. Because we know you will make these trainings your own, we've developed an editable format to assist you with customizing trainings within your own library community. We hope this style guide will make it easier to maintain the curriculum brand as you make edits and adapt these trainings to best meet your needs.

COLOR

All text and tables in the curriculum use one of the following color compositions.

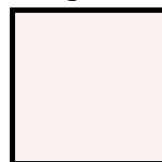| BLACK	BLUE	ORANGE	LIGHT ORANGE
R: 0	R: 20	R: 206	R: 252
G: 0	G: 30	G: 81	G: 241
B: 0	B: 60	B: 43	B: 238

FONT

Each of our curriculum sessions combines a serif (Palatino Linotype) with a sans serif (Verdana) font. Here we've outlined the most common text treatments:

# Session Heading	Palatino Linotype 30pt	blue
## Segment (Part) Heading	Palatino Linotype 16pt	orange
SEGMENT OVERVIEW	Palatino Linotype 12pt bold caps	blue
SECTION HEADING	Palatino Linotype 11pt bold caps	orange
SIDEBAR HEADING	Palatino Linotype 11pt bold caps	blue
Body Copy	Verdana 11pt	black
Sidebar Copy	Verdana 9pt italic	black

WORKING IN TABLES

All text and graphics are formatted into tables which will automatically expand or collapse with edits to the text.

TABLE PROPERTIES

- Column 1 is 1.32" wide with right aligned text
- Column 2 is 5.83" wide with left aligned text indented by .43
- Bullet points are left aligned with a .43 indent

TABLE DESIGN

- All text tables should be set with "No Borders" after making edits
- However, it is easiest to edit the curriculum sessions when all table borders are visible; go to "Home:Paragraph:All Borders" to change border appearances
- For all segment headings, tables are formatted with top and bottom borders at 2.25pt weight in blue; go to "Borders and Shading:Borders" to alter
- For all activities, tables are formatted with outside borders at 2.25pt weight in orange; go to "Borders and Shading:Borders" to change border appearances
- Headings for all activities are shaded in light orange; go to "Borders and Shading:Shading:Fill" to change the fill color of a selected cell

FORMAT AND SPACING

SPACING

- Paragraph text should be formatted with multiple line spacing at 1.15
- Heading text should be formatted with single spacing
- All text should have 0pt spacing "before" and "after" text

BACKGROUND

- The background JPG is inserted into the document as a "Header"
- Go to "Insert:Picture" and adjust the size of the JPG to 8.5" x 11"
- Drag the background JPG to align with edges of document
- Set the background to appear behind the document text by going to "Format:Arrange:Behind Text"

ICONS

- To include icons in the sidebars, go to "Insert:Picture"
- Set the icons to appear in line with text by going to "Format:Arrange:In Line with Text"