

Introduction to Advocacy for Digital Preservation



Getting Started with Advocacy



Digital preservation is one of those things we cannot (effectively) do on our own:

- skills and services from within or outside our organizations.
- as many people as possible to be aware of what it is, why it matters, what it entails, and what you need to do it.

Even where digital preservation is well established, there will be new challenges, staff changes, and the support required to enable effective digital preservation is likely to constantly change.

Digital preservation less of a technological problem, but more of a human one.

Helping stakeholders understand:

- **Risks**
- **Opportunities**
- **What is required**

Objective

To be better equipped to talk about digital preservation to our colleagues and those people in our organisation who can provide the support we need to do it.

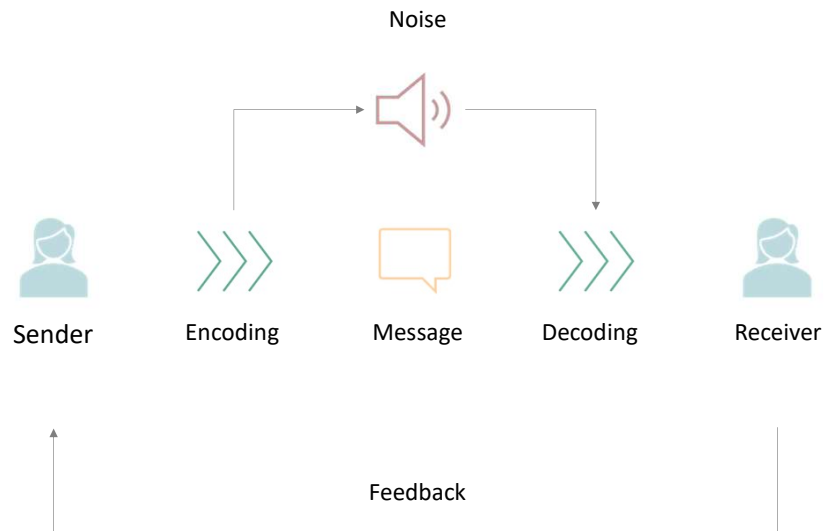
An ongoing process



Advocacy being the ultimate: a person who understands digital preservation, sees the benefits and is prepared to champion the cause / organisation state where digital preservation is fully embedded.

1. Awareness Raising: Goal - To show the value of digital preservation, provide educational content, demonstrate benefits and build a relationship with your intended audience.
2. Engagement: Goal - To identify and build a deeper relationship with key personnel who can help support your cause, introduce them to digital preservation through targeted messages.
3. Making the Case: Goal - To convince these key personnel to provide the resources you need in support of digital preservation.
4. Advocacy: Goal - Turn your audience into champions for digital preservation, so that they tell others about this for you.

How we communicate



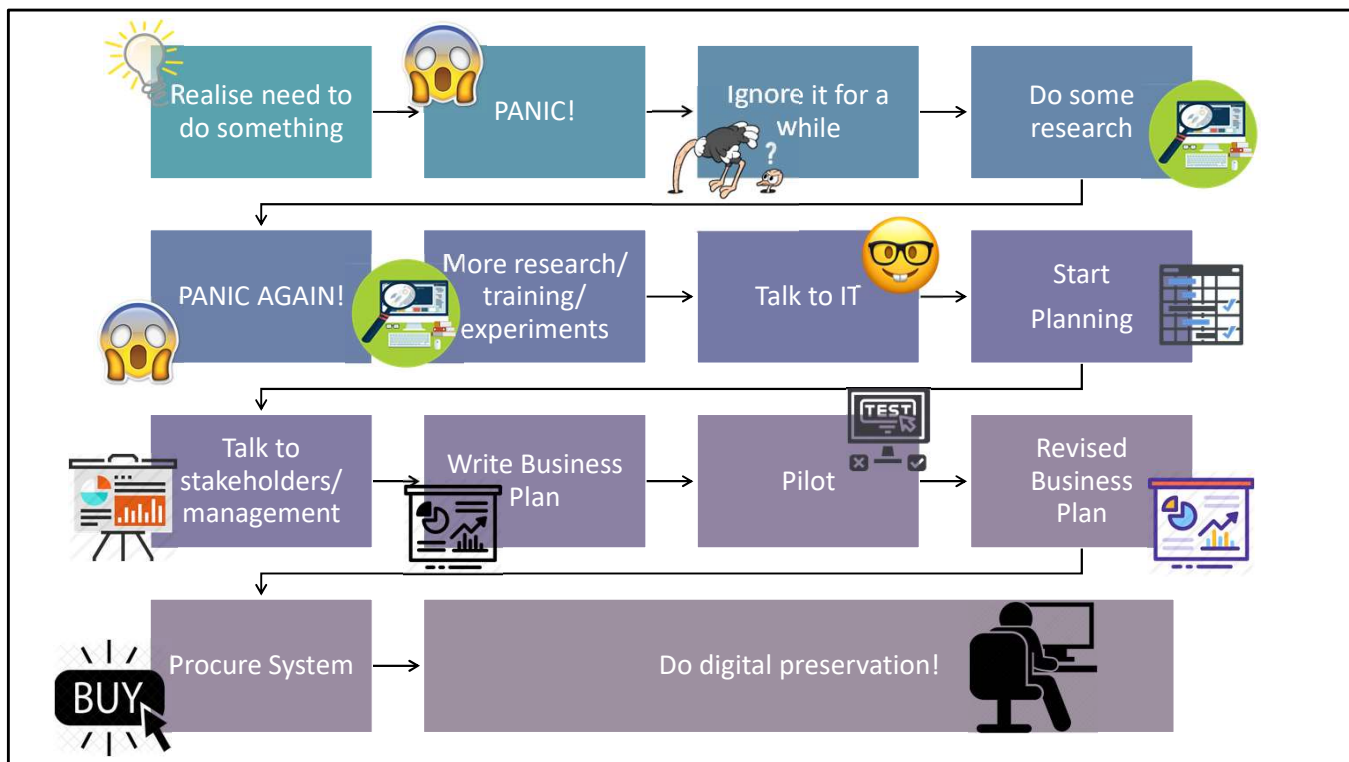
- **Sender:** the person initiating a message.
- Whether you realise it or not, you **encode** the message based on your own experiences, understanding, intent, mood...
- **Message:** what you would like to be received and understood but actually what the message REALLY is, is what is understood by the receiver – not what you ‘send.’ It could be very different.
- **Receiver:** the person or people who will receive, process and provide feedback on your message. They may not understand the importance of digital preservation the way you do – and this reflects in the way they **decode** your message.

Noise: other messages, requests for funding, calls for meetings and everything else that happens in an average working day... means that your message has to cut through this

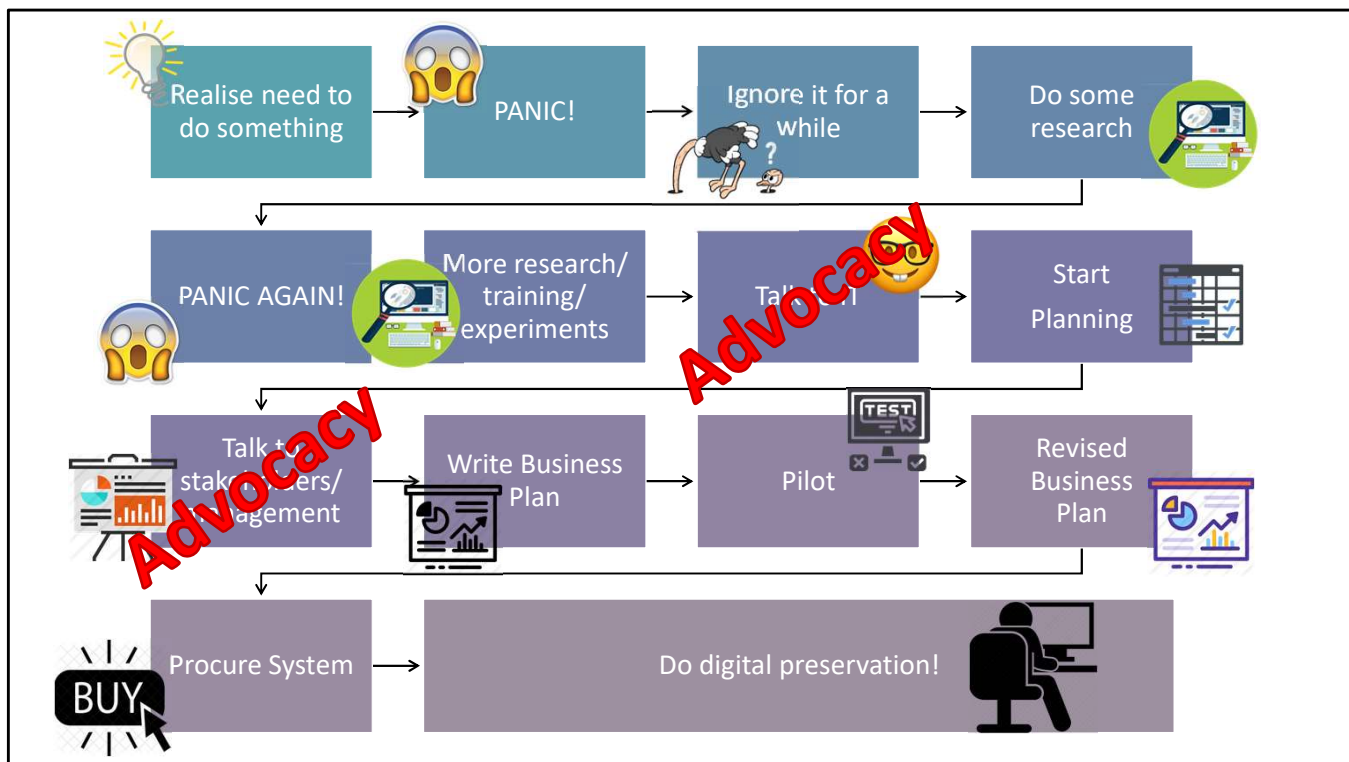
Feedback is how the receiver responds to your message. If they respond the way you had hoped – the message has been transmitted successfully. If not, there has either been interference along the way, or the message might not have been right to begin with.

When?

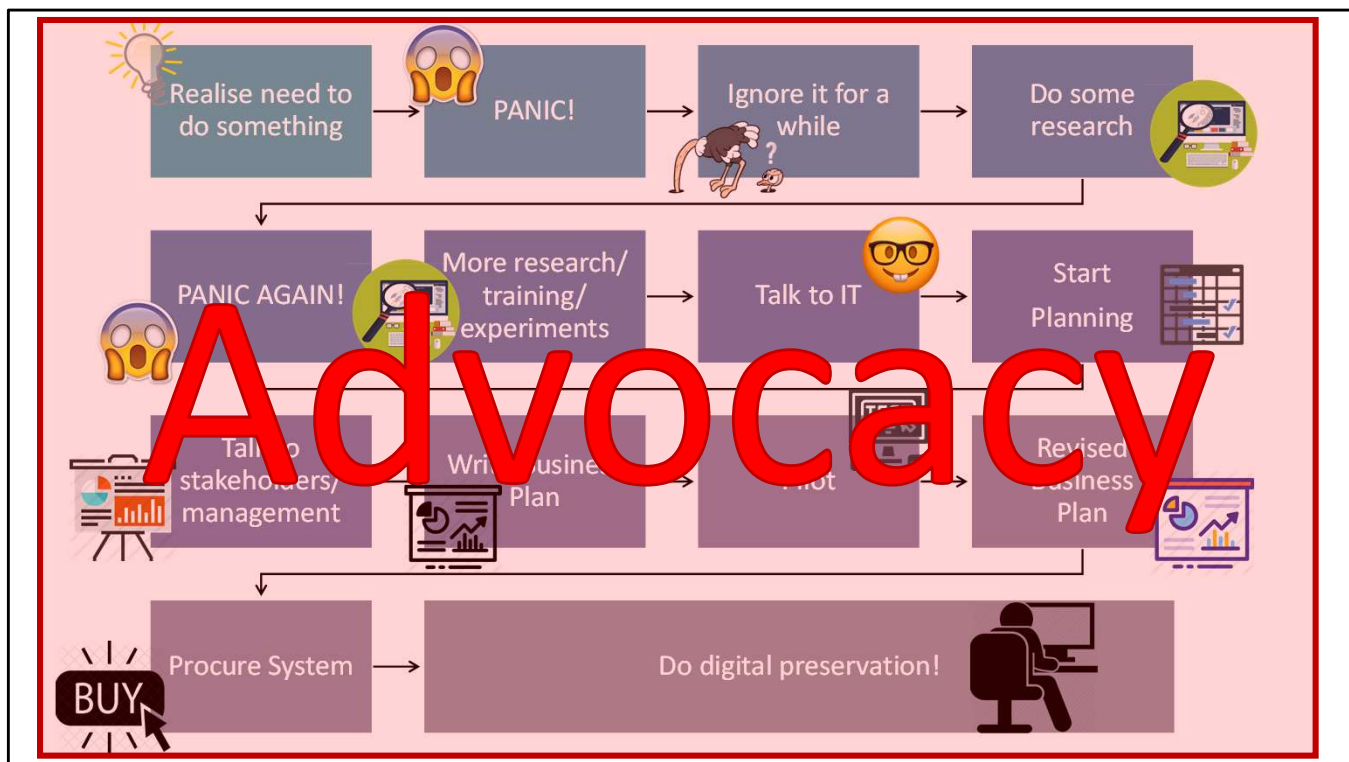





Here is what might happen as you identify a 'need' for support, or a resource...



Potential points for advocacy?



It's actually all the time!

A photograph of a church interior. In the foreground, a group of people are seated in a circle on folding chairs, facing a presentation screen. The screen displays a slide with the text "Digital Preservation". The church has high stone walls, large wooden pillars, and a large stained glass window in the background. A white circle is overlaid on the left side of the image, containing the text "Know your audience".

Know your audience

Messages about digital preservation must be relevant to the people you are trying to convince.

Start at the end of the communications process – with the ‘receiver’ or target audience – and work backwards.

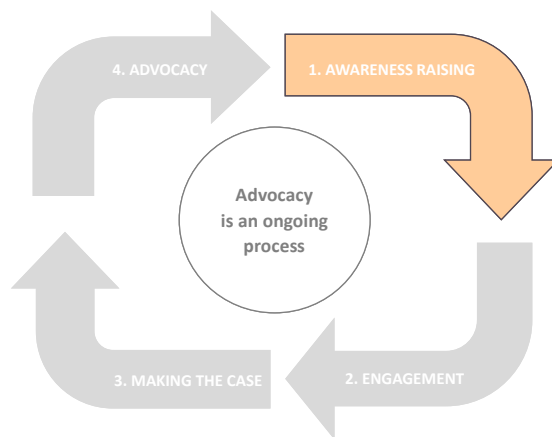
Everyone interprets communications and messages in a different way. Understanding our audience, helps anticipate the way they will do this, so you can make sure your message is transmitted accurately and the message is understood as intended.

Awareness raising

Audience: Broad

Do: Educate, be helpful.

Don't: Give too many specific details about digital preservation, try to persuade your audience to commit to supporting your cause straight away.



1. Awareness

Do: Educate, be helpful.

Don't: Give too many specific details about digital preservation, try to persuade your audience to commit to supporting your cause straight away.

How? Through informal chats, delivering seminars, by 'being there' for other colleagues... this is a great opportunity to develop and refine some key messages into elevator pitches, which you can use to grab attention.

Engagement

Audience: More targeted, Key personnel

Do: Provide educational information tailored to this audience, deliver messages specific to their own interests or priorities, be helpful.

Don't: Go over the top, send information that isn't applicable.



2. Engagement

Audience: More targeted, key personnel in your organisation who can support your endeavours

Do: Provide educational information tailored to your audience, deliver messages specific to their own interests or priorities, be helpful.

Don't: Go over the top, send information that isn't applicable.

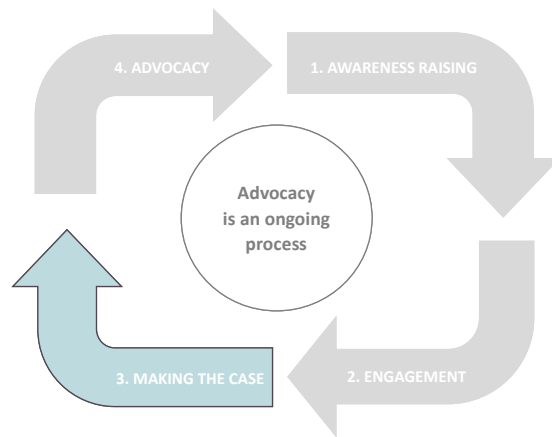
How? Once you have caught the attention of one or two more key personnel, see if you can set up a more formal meeting to discuss some more of the benefits you identified in step 1. Here you might share a draft policy document, or a gap analysis, risk/opportunity register, or a completed RAM assessment which shows where you are, where your contemporaries and peers are, and where you would like to be...

Make the case

Audience: Key personnel

Do: Talk about the benefits, demonstrate how it can support their own areas of interest or concern, offer solutions, (if you can) use current affairs or business opportunities to create a sense of urgency.

Don't: Bombard your audience with lots of calls and emails!



3. Make the case

Audience: key personnel

Do: Talk about the benefits of digital preservation, demonstrate how it can support their own areas of interest or concern, offer business solutions, (if you can) use current affairs or a business opportunity to create a sense of urgency to compel your audience to commit to providing the resources you need.

Don't: Bombard your audience with lots of calls and emails!

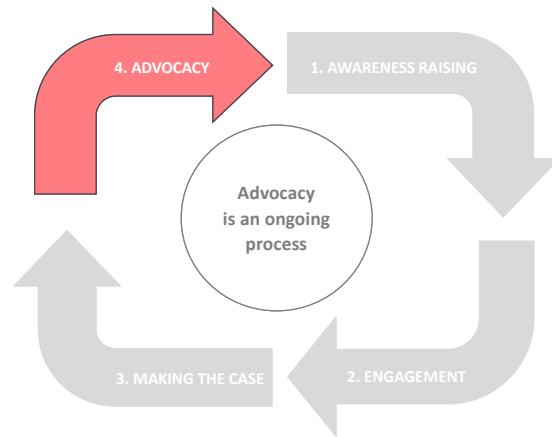
How – Write up your proposal, give a presentation, make a pitch

Advocacy

Audience: Your champions!

Do: Give helpful information, keep demonstrating how digital preservation can support the organisation, collect feedback.

Don't: Stop interacting with your audiences or showing how digital preservation adds value to your organisation.



4. Advocacy

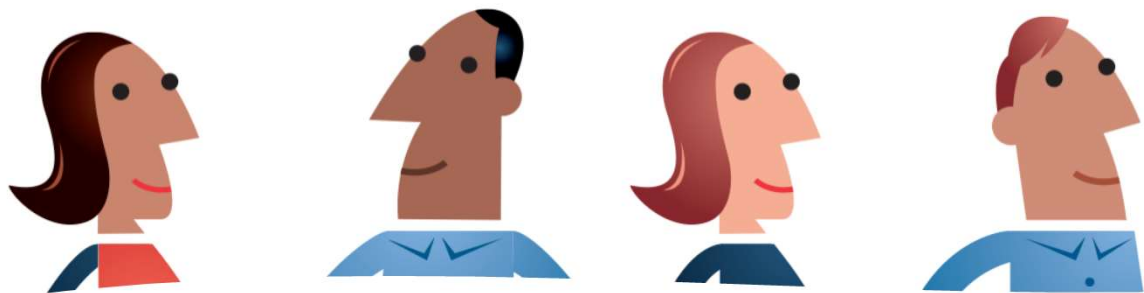
Audience: Your champions

Do: Give helpful information, keep demonstrating how digital preservation can support the organisation, collect feedback.

Don't: Stop interacting with your audiences or showing how digital preservation adds value to your organisation. It is a continuous process.

How – whatever works best

Repeat – because people change, people leave organisations, needs change.



Who?

- | | |
|--|---|
| • Colleagues within your department | Aligned interests |
| • IT department | Resources, technology, security |
| • Finance department / budget holders | Cost, return on investment, core business |
| • Senior Executives | Strategic objectives |
| • Policy makers | Policy landscape, strategic objectives |
| • Funders | Impact, Sustainability |
| • External stakeholders | ... |

Who makes up audience groups depends from organisation to organisation, but essentially it is whoever you need to persuade to move digital preservation up the agenda.

Each of them will have their own interests and concerns...

Talking to IT



It can be a challenge!

- Can be a key ally, but how do we get them to engage?
- Differences in terminology
- Different ways of working
 - Normally concerned with the now
 - We need them to think about past, present, future
- Some issues with territory guarding!



It can be hard!

Largely down to a difference of understanding based on terminology and to a difference in a way of working.

IT colleagues tend to work in a very here and now focused / project-centric way – installing systems and keeping those systems running. One of the key messages we have is that digital preservation is not a one off, it is an ongoing process, so needs their assistance and buy-in to think about the long term, as well as the here and now.

To further complicate matters, IT personnel perform activities that sound very much like digital preservation: archiving, backups and storage of multiple copies.

There may also be some issues around territory guarding...

Steps to engage with IT

- Understand policies, programs, terminology
- Frame digital preservation as a novel problem
- Find a key ally
- Start a working group
- Develop a shared vocabulary
- Be prepared to ask and answer questions



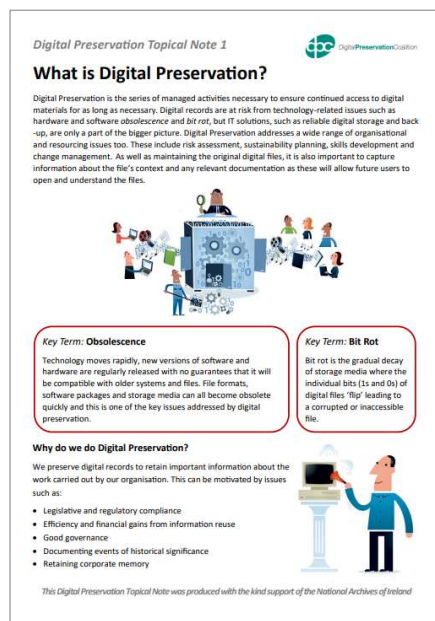
Prater, Scott, "How to Talk to IT About Digital Preservation" - <https://minds.wisconsin.edu/handle/1793/78844>

The same process can be applied:

- Start by talking to IT to understand their concerns, ask questions about the policies they need to work to, what they are working on now and what's coming up, and what they mean by X, Y, Z.
- Be prepared to listen.
- Once you have established that understanding you can present digital preservation as a challenge you can work on together.
- Including IT in a working group to address the challenge in your organisation can help you establish a useful alliance.
- Scott Prater's 'How to Talk to IT about Digital Preservation' has got some good ideas:
 - glossary of terms in a language understandable and relatable to IT professionals,
 - a list of questions your IT colleagues might ask (so that you can be prepared!)
 - tips on 'how not to ask' for IT support!

Topical Notes

- Aimed at non-specialist audience
- Explain key digital preservation issues:
 - Introduction to Digital Preservation
 - Storage
 - Metadata
 - Authenticity
 - File Naming and Formats
 - Various types of content including emails, images, and websites



<https://www.dpconline.org/digipres/discover-good-practice/tech-watch-reports>

Audiences you are targeting are likely to be non-specialist non-digital preservationists

An entry level introduction to some basic digital preservation topics might be useful

The DPC has a suite of these notes available for you to use covering topics including:

- Storage
- Metadata
- Authenticity
- File Naming and Formats
- Various types of content

Set goals, identify concerns

- Think personal
 - Professional / role related
 - Personal interests

- Think big
 - Organisational commitments
 - Organisational mission
 - Organisational motivators
 - Accountability
 - Corporate / Cultural memory
 - Reputation
 - Costs



You can identify interests, concerns and priorities.

Having this information will help you present your message in a way that appeals to them, personally, and makes it more likely that the message will be understood.

Think personal

- Are they short of staff, resources, budget themselves?
- Are they struggling to access the information they need to do their jobs well?
- Do they have any personal interests which could relate to digital preservation, or even the collections you maintain?

But this information about an individual is so valuable, and will help you engage on a personal level with them, to create and tell a meaningful story about digital preservation.

Think big

What are your organisation's commitments/mission/drivers/motivators – why is your organisation doing what it is doing?

These can be identified in your organisation's Strategic Plan (or other guiding document)

Some examples of organisational motivators:

- Accountability – Does your organisation need to remain transparent in its activities, to demonstrate what it does or the extent to which it does it? This is often the case when public money is being spent.

- Corporate/ Cultural Memory – perhaps this is a public mandate for your organisation, and they are obliged to accept and preserve digital records. Being seen to be able to fulfil that mandate reflects on the capability and credibility of the organisation. Or a business function which records the longevity of a product or service provided?
- Reputation – all organisations will want to maintain their standing in their field or market. For public organisations a perceived loss of reputation can have a knock on effect for funding, and for commercial organisations it can mean loss of consumer confidence, loss of market share, reduced revenue
- Costs – I'm sure there isn't an organisation that doesn't think about costs, how to reduce costs, how to increase revenue

These motivators all influence how an individual responds to the idea of digital preservation, AND digital preservation can also respond to and support these concerns too!

The Executive Guide on Digital Preservation

A combination of generic and specific messages and motivators designed to communicate with senior executives, legislators and budget holders, as well as decision and policy makers with a view to embedding the value of digital preservation at the core of every organization.

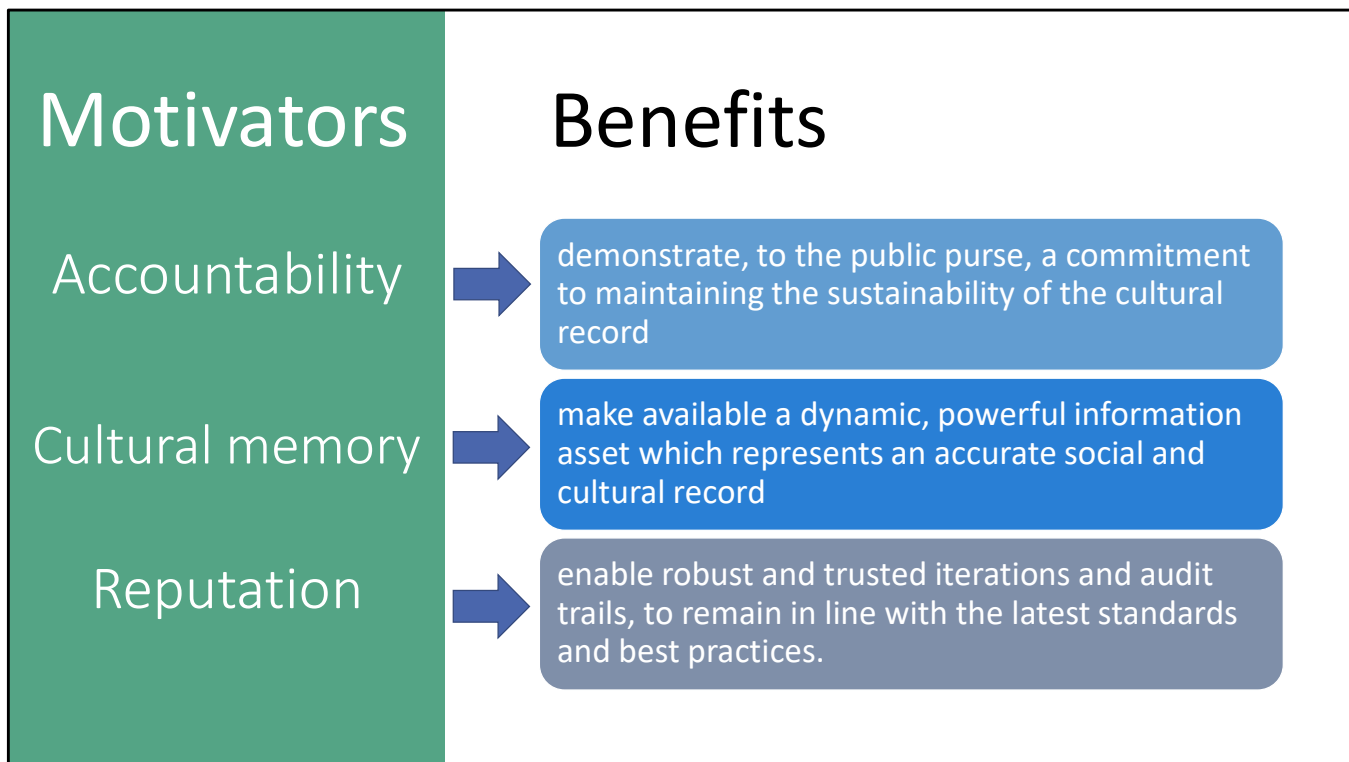


What is your Organisation type? Choose from generic statements and tailor them to your own organisation, or select statements specific to a range of organisation types.	What are your Organisation's Motivators? Motivators are topics or issues that are particularly relevant or important to your organisation.
What is Digital Preservation? "Digital Preservation is a series of managed activities necessary to ensure continued access to digital materials for as long as necessary."	What are the Risks of not preserving digital materials? "Failing to preserve digital materials renders them unusable"
What Opportunities do preserved digital materials create? "Preserving digital materials creates opportunities that align with the key motivators in your organization"	What does Digital Preservation need? "Digital Preservation needs an enabling policy and regulatory environment including organisations and technical infrastructure which is appropriately resourced."
Facts and Figures Add evidence which supports the case for Digital Preservation to your templates	Templates Download editable PowerPoint and Word templates and customise them with statements from the Executive Guide.

<https://www.dpconline.org/digipres/implement-digipres/dpeg-home>

Created by volunteer organisations from the DPC who identified for their organisation:

- What the motivators were
- What messages would have most impact



Benefits vs Features



Using motivators, you can create a powerful message about digital preservation to meet that particular concern!

Not talking about digital preservation itself anymore, we're talking about the benefits associated with digital preservation.

Talking in the language of your audience, we're talking about accountability, about cost and about risk, and how to address that *through* digital preservation.

Message content



N – Need

Empathise with your audience and show them that you understand their own needs

O – Opportunity

Introduce the opportunities that digital preservation can bring about, how it can meet the need in question, tailored to your audiences!

S – Solution

Identify what would be required in order for the solution to be realised (your proposal)

E – Evidence

Use facts and figures, graphs and charts to show how

The Executive Guide statements represent some of the *opportunities* that digital preservation can bring about, or *risks* that it can mitigate.

This makes up an important part of your message, but it should also comprise these elements:

N – identify this through conversations as you raise awareness and engage

O – introduce as you engage

S – as you pitch what you need for digital preservation

E – in your business case and as you continue to demonstrate value

Build your army of advocates

- Use what you know
- Find out more
- Be ready to talk about the TAILORED benefits (risks and opportunities)!
- Follow up, demonstrate, provide evidence
- Share the love!



Use what you know and take opportunities!

- start a conversation (can be informal, in the kitchen/corridor/in the lift) – ask what they are working on, be ready, follow up!
- Arrange a more 'formal' appointment to demonstrate the benefits of digital preservation in more detail!
- Once they are persuaded and 'on-board' you can move on to the 'what does digital preservation need!'

Build your army of advocates:

And use their knowledge and connections to reach further and higher into your organisation, for you.

The more people who are persuaded that digital preservation is a good thing the better – and increases the chances of the message getting to wherever it needs to get to.