Advocating for Digital Preservation

#dpcadvocacy

WIFI - Username: dpcevent Password: dpcevent
Program

• 10.00 *Registration opens, tea and coffee*
• 10.30 Welcome and Introductions
• 10.40 Getting Started with Advocacy: Identifying the Challenges for Your Organisation
• 11:10 EXERCISE: Identifying Value and Opportunities and Aligning with Your Strategic Plan
• 11:45 How to Create an Elevator Pitch
• 12:00 EXERCISE: Drafting an Elevator Pitch
• 12:30 *Lunch*
• 13:30 What’s Worked: Stories of Success from DPC Members
• 14:30 EXERCISE: Practising and Feedback on Elevator Pitches (*over tea and coffee*)
• 15:30 Next Steps: Building a Building Business Case and Useful Resources
• 15:50 Final Questions and Wrap-Up
• 16.00 *Close*
Objective

You leave better equipped to communicate with your colleagues on issues that will help you do your jobs

(and create a secure digital legacy)
Getting Started with Advocacy: Identifying the challenge for your organisation
It is not straightforward

• People are working on this challenge as we speak.
• There is a whole community sharing and celebrating good work and good ideas!
• It is an opportunity to be seized!
It seems expensive

• Digital preservation can provide:
  • Cost efficiencies through planned disposal and deletion
  • Greater scope for innovation and reuse of data
  • A way to avoid financial penalties
Not the core mission

- Well managed data can underpin and support all parts of a business!
  - marketing campaigns by providing access to corporate history
  - compliance by demonstrating a clear audit trail
  - efficiencies of scale through shared services, resources and consolidated systems
  - cost efficiencies through the greater automation of processes
  - HR and customer service functions by providing access to the right data at the right time!
Tools and tips
Know your audience
Identify their concerns

• Think big
  • Organisational commitments
  • Organisational mission
  • Organisational motivators

• Think personal
  • Professional / role related
  • Personal interests
Accountability

demonstrate greater transparency through documented audit trails

demonstrate, to the public purse, a commitment to maintaining the sustainability of the cultural record

instil trust in cultural and creative data by demonstrating a complete cultural record
Cultural/ Corporate Memory

- make available a dynamic, powerful information asset which represents an accurate social and cultural record
- inform and educate the public by enabling access to diverse digital data and records
- inspire the trust and understanding of future users, by providing a complete digital record
Enabling Research

capture potential by providing greater scope for innovation and reuse of data – and at scale!

provide opportunities for raising funds through the reuse of existing data

generate income and new service models through the reuse of existing data
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!
Exercise: Aligning Value and Opportunities of DP with Your Strategic Plan

• List at least 5 motivators for DP relevant to your organisational context
• Match these to points in the organisation’s Strategic Plan
  • Particularly priority issues
• Focus on how DP can bring value and opportunities
Establishing Communication: Creating an Elevator Pitch
We’ve identified motivators and aligned them with the Strategic Plan. What next?
DP is Hard to Explain!

• I dread the question “what do you do for work?”
• Must be prepared for any opportunity to sell DP
• Being clear and confident makes an impact
• Worth putting a bit of time into an Elevator Pitch
What is an Elevator Pitch?

• A super short ‘impromptu’ presentation
  • 30 seconds to 2 minutes

• Should have:
  • A clear goal
  • A story
  • An emotional connection
  • A call to action
Some useful ways to think about your pitch
Storytelling

- Stories speak to the human condition
- Personalising can lead to greater buy-in
- Decision-making an emotionally driven process.
- Story must be compelling and authentic
- Stories bring data/facts to life
- A good story has:
  - A personal challenge
  - A (potential) conquest/triumph
  - Relevance, as well as an emotional connection
  - An anchor to time and place
Head, Heart and Hand

• **Heart**: Establish rapport and seek empathy with your listener.

• **Head**: Offer supportive evidence to prove need.

• **Hand**: Remember to ask your listener to take action.
The Golden Circle

• What – Execs know what the org does
• How – Most know how it is done
• Why – Most don’t think about why it’s done.
  • More than money!
  • Influences behaviour
  • Inspires action

https://youtu.be/IPYeCltXpxw
A Few More Tips

- Know your audience
- Don’t go straight for the hard sell
- Be confident
- Be open to compromise
- Know what you don’t know
- Ask for advice/input
- Don’t over invest in a single argument
- Be prepared and ready to switch tack
- Be positive, but manage expectations
- Be aware that advocacy is a(n often long) process
Exercise: Developing an Elevator Pitch (1)

• Develop a draft now
  • Will refine & practice this afternoon

• Decide how long (30s-2min)
  • Average presentation speed 125-150 words per min

• What are the key points?

• Use a particular structure?
  • Story, HHH, Golden Circle

• Think about your audience!
Lunch!
What’s Worked: Stories of Success from DPC Members
Exercise: Developing an Elevator Pitch (2)

First 20 mins:
• Refine draft pitch

Middle 20 mins:
• Practice presenting in small groups and get feedback

Final 20 mins:
• Brave volunteers present to the group (there’s a prize to be won!)
Next Steps: Building a Business Case and Useful Resources
You’ve caught their attention, what next?
Going a bit deeper....
Business Cases

Key step in gaining (financial) support and resources for programme/project

Generally include sections on:

• Objectives
• Stakeholders
• Financial Analysis
• Benefits
• Risks

Developing a Business Case (1)

1. Preparation
2. Audit your organisation’s readiness
3. Assess where you are and what you need
4. Think hard about your audience
5. Work out your objectives

Developing a Business Case (2)

6. Identify Benefits
7. Prepare content for the business case template
8. Validate and refine
9. Deliver your business with maximum impact
10. Share!

Some useful resources to help with advocacy and building a business case
Business Case Toolkit

• Step by Step Guide
• Business Case Template
• Common Questions
• Case Studies
• Additional Resources.....

Risks: DRAMBORA

http://www.repositoryaudit.eu/
More on Risks...

ISO:31000 - Risk management. Principles and guidance
www.ico.org/iso/home/standards/iso31000.htm

TNA digital continuity service

SPOT
www.dlib.org/dlib/september12/vermaaten/09vermaaten.html

IIPC Preservation Working Group Table of Risks
https://netpreserve.org/pwg/risks.php
Identifying Benefits: KRDS

http://www.beagrie.com/krds/
Costs: Curation Costs Exchange

http://www.curationexchange.org/
Costs: The Cost of Doing Nothing....

http://www.repositoryaudit.eu/
Talking to IT

• Learn to talk (some of) their language!
• “How to Talk to IT About DP” by Scott Prater
  https://minds.wisconsin.edu/handle/1793/78844
• Take a few basic courses through ILEs like Coursera
Maturity Modelling

- Strengths and weaknesses
- Goals and timescales
- Incremental development
- Planned improvements
- Not just about techniques

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Maturity Models

• Digital Preservation Capability Maturity Model
• NDSA Levels of Digital Preservation
• Adrian Brown’s advice on Maturity Modelling
• AOR Toolkit (Cornell’s 5 stages)
• DRAMBORA
And from the DPC...
Coming Soon! DPC RAM

• Rapid Assessment Model
• 11 criteria and 5 levels of maturity

The model aims to be:

• Applicable for organizations of any size and in any sector
• Applicable for all content of long-term value
• Preservation strategy and solution agnostic
• Based on existing good practice
• Simple to understand and quick to apply

• Can complete in under 2 hours!
Executive Guide on Digital Preservation

The Executive Guide on Digital Preservation provides practitioners with 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.

https://www.dpconline.org/our-work/dpeg-home
Digital Preservation Awards

• Biennial awards celebrating excellence in DP
• A great way to highlight successes

• Award Categories
  • Research and Innovation
  • Teaching and Communications
  • Distinguished Student Work
  • Outstanding DP Initiative in Industry, Commerce or 3\textsuperscript{rd} Sector
  • Safeguarding the Digital Legacy
  • Fellowship

• Coming up in 2020!
World Digital Preservation Day

• Yearly opportunity to raise awareness of DP
• Get involved:
  • Tweet
  • Blog
  • Hold an event
  • Record a video
  • Sing and dance....
• 7th November 2019 – Mark it in your diaries!
Prize Giving (!) and Final Questions
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Many thanks to www.digitalbevaring.dk for the illustrations