

COMMUNICATION & COUNSEL

Subject: Engagement and Advocacy Update

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Purpose

This status report provides an update to the Board on activities related to the Engagement and Advocacy Strategy, and presents the action plan for further steps.

The objectives of the Engagement and Advocacy Strategy are to:

- Increase the OPL's appeal, recognition, and profile in Ottawa;
- Build and tell a story that showcases the OPL as a provider of valuable service that is relevant and modern, which contributes to the community and to the local economy; and,
- Create a fresh, strong, consistent and compelling brand identity.

References

- *Library Engagement and Advocacy Strategy*, OPL Board Report #5, October 17, 2011
- September 12, 2011 Tri-board meeting with OPL, FOPLA, OPLF; *Advancing 21st Century Literacy*, Andrea M. McCormick, 2011

- Federation of Ontario Public Libraries *Advocacy Marketing Plan* (2010-2012)
- *OPL Strategic Plan 2012-2015* Strategic Direction: Engagement of Customers, Communities, Partners, Employees and Volunteers

Background

The Ottawa Public Library has evolved since amalgamation to respond to the needs of each of the distinct communities served by its 33 branches. With a strategic focus on system-wide programs, integrated service excellence and the increasing demand on virtual services through BiblioOttawaLibrary.ca, the Library needs to refresh its brand identity to increase its appeal, recognition, and unify its profile in the community.

With nearly unlimited information readily available on the Internet, and limited resources to be shared among public organizations, there is currently much debate about the role and the identity of the public library. Recent coverage of Toronto municipal budget decisions, on CBC Radio including the May 30, 2012 show *Q: [Read on Libraries](#)* and the June 7, 2012 #CanLit Twitter chat *The future of libraries and the role of libraries in the digital age*, highlight the need to build understanding among stakeholders about the Library as a transformative contributor to Ottawa's future.

Progress to date

Phase I

The 2011 Board-approved *Library Engagement and Advocacy Strategy* recommended segmentation of an advocacy and engagement program into at least two phases for effective results, and proposed a preliminary process to initiate the development of the first phase through meetings, training and participation in the 2012 budget process. It also proposed the further development of specific strategies, plans, marketing campaigns and a branding campaign.

A realignment of the preliminary plan for this initiative has been shaped by significant organizational changes since October 2011 including:

- The need to align activities with the recently adopted OPL strategic plan for 2012 to 2015, including a focus on RFID

- A change of leadership at OPL, with the engagement of a new CEO in March 2012.

Phase II

This status report provides an update on activities since the fall, but focuses on Phase 2 of the plan, offering a series of specific action plans which address the following distinct but complementary areas: Engagement, Advocacy, and Branding.

These plans, which leverage work done at the Library and at the provincial level, have been developed to:

- increase decision-makers' understanding of the issues and challenges faced by, and opportunities provided by today's public library;
- bridge the knowledge gap between the satisfied customers and non-users who may have dated perceptions of public libraries; and,
- improve the customer experience and perceptions of the Library through a consistent visual branding program.

While the Ottawa Public Library will take the lead on engagement, advocacy and branding, collaboration among the OPL, the OPL Foundation and FOPLA will be critical to the success of these initiatives. OPL will consult with the Board, the Foundation and the Friends to develop key messages which can be integrated to partner initiatives, and to identify and pursue opportunities for collaborative action.

Engagement is defined as active participation and involvement in the activities of the library.

Participation in library activities and loans of library materials, attendance at programs, use of services, downloads of eBooks, digital music, and other items are increasing at the OPL.

Growing numbers of library customers provide feedback about their positive – even transformative - experience of library programs, their appreciation for the technological innovations which serve their needs, and the expertise and welcoming attitude of employees.

Nevertheless, non-users' perceptions may show a lack of understanding of the Library's transformative role. Opportunities to engage directly with the public, to

listen and respond to customer comments and to create the conditions for them to connect with others in unique ways, must be leveraged to demonstrate how the Library is a vital part of the lives of citizens.

An engagement campaign, using testimonials from both internal and external members of the OPL community, is designed to re-position the Ottawa Public Library as relevant, engaged and modern, and to increase dialogue about how it contributes to the community.

Engagement activities to date

Using multiple vehicles and channels, the Library has increased the opportunities for customers and employees to engage, connect and interact at the Library.

Highlights include

- The redesigned web homepage highlights blogs, social media, polls and surveys.
- Five OPL branches hosted January's Human Library, organized with two new partners, an innovative city-wide event which brought together people from all walks of life in our city to create better understanding of one another.
- OPL Twitter activity with emphasis on consultation and discussion has increased. @OPL-BPO is developing an identity in the Twitterverse with a strong reputation for distinctive, responsive engagement with a growing community of over 1,500 followers.
- The Teen Tech week video contest successfully engaged local youth to bring favourite readings and current technology together.
- OPL's participation in Comiccon was leveraged as innovative outreach to a dynamic segment of Library clientele.

Appendix A identifies high-potential engagement initiatives which will be pursued as opportunities arise. Ongoing public and media relations efforts will also be leveraged to reach new audiences.

Advocacy is a sustained, planned deliberate effort to develop understanding, respect and support.

The public library is not on the radar screen of decision makers. There is limited understanding of the transformative role that it plays for Ottawa citizens. While the Library may be perceived as a competitor to other public sector activities, it is actually a facilitator of the city's work in health, education, and economic development. The objective of the activities below is to improve the understanding of municipal elected and non-elected officials of how uniquely the Ottawa Public Library contributes to City priorities.

The following messages are adapted from the Federation of Ontario Public Libraries *Advocacy Marketing Plan 2010-2012*:

Key message:

The Library is a welcoming community hub, a critical component of a healthy city.

Supporting messages:

- Libraries have a multi-purpose role in the community and are part of the cultural, social, educational, economic development sectors
 - With a multitude of resources for entrepreneurs and families
- Libraries are the natural partner for departments and agencies which need unconstrained, non-intimidating access to the public
 - As the living room of community, libraries are a safe gathering place
 - Libraries are already part of the public's travel and usage patterns
- Librarians are experts at public interaction with training in service excellence.
- Libraries are economic development drivers
 - Sought-after amenities used to attract residents and investors to communities
 - Wireless access and computer literacy programs bridge the digital divide for seniors, newcomers, and people of lower socio-economic status

- OPL Business Services provide advice, resources and guidance to entrepreneurs and small- and medium-sized enterprises

Library priorities complement the priorities of the City, as noted in the Strategic Crosswalk document.

Advocacy activities to date

- Five OPL, OPLF and FOPLA employees and board members participated in Public Libraries Association online advocacy course *Turning the Page 2.0*.
- The OPL participated in the 2012 budget process by preparing information kits and sending representatives to public information sessions.
- The OPL Foundation has met with OPL to develop sponsorship proposals for potential donors.
- The OPL Foundation collaborated with OPL to develop and deliver key OPL messages at its November Literary event and other functions.
- FOPLA key messages have been developed and shared by board representatives at three OPL events.
- In April, OPL hosted its first ever Biblio-forum for leaders of francophone and francophile organizations, which positioned the Library as active participant in this key network.
- Events in 5 branches celebrated donations of technology by councillors to their communities.

Appendix A identifies high-potential advocacy initiatives which will be pursued as opportunities arise. Ongoing public and media relations efforts will also be leveraged to reach new audiences.

Branding is the intangible sum of attributes, the perception and the expectations that reside in each customer's mind about a product, service or company.

The current Ottawa Public Library logo has been in service since amalgamation in 2001.

A renewal of the graphic identity and creation and deployment of a fresh and modern, consistent and unifying brand identity will increase the appeal, recognition and profile of the Ottawa Public Library in the community.

A successful model with similar objectives, the Edmonton Public Library's prizewinning 2010 re-branding initiative included:

- Engagement of an agency/design consultancy to research and develop shared values statements, and to develop a brand mark, and logo incorporating the promise, 'Spread the words.'
- Implementation and application of these graphics to a broad range of materials, from library cards to book bags to TV commercials to signage, has been integrated into EPL communications and marketing operations ever since.
- Phase 2 of the EPL re-branding program, with an emphasis on branch signage and ambiance, is in development and was presented at CLA 2012.

Branding activities to date

- Integrated marketing campaigns have been developed and deployed for multiple system-wide initiatives.
- Tools and templates are being developed and shared for branch-level promotion.
- Digital signage has facilitated consistent and current presentation of messages in OPL branches, thanks to support from FOPLA.
- The all-encompassing program publication *Preview* has been retired, minimizing the expense and ecological impact of print materials, focusing attention on the website, and permitting targeted campaigns.
- A consistent approach is being taken to all OPL signage.
- The French Language Services Task Force is developing comprehensive lists of terminology in both official languages, to equip employees with consistent and correct usage of terms for signage and promotion of library programs and services.

Appendix A identifies high-potential new initiatives which will be pursued as opportunities arise and as funding is identified. Ongoing communications and marketing efforts will also be leveraged to reach new audiences.

A complete rebranding program is a multi-year exercise with significant system-wide implications and costs; an incremental approach will be initiated in 2013 with the development, design and launch of a new graphic identity and tagline; deployment will be phased in over time in response to program and service information and promotion needs, and replacement and renewal cycles for signage and other infrastructure.

Next steps:

- This report will be shared with the Foundation and FOPLA to solicit feedback, identify collaborative opportunities, and further the plan.
- OPL will work through the action plans as per the schedule of implementation proposed.
- Additional funding requirements will be reviewed and brought forward at budget time for consideration.
- Reports on results will be presented to Board semi-annually.

ENGAGEMENT					
Activity/Tool/Product	Responsibility	Description	Targets	Timeline	Performance Measures
Community Spokespeople	OPL	<ul style="list-style-type: none"> ▪ A number of leaders from within the community will be identified by employees, OPL board, FOPLA and OPLF and asked to serve as OPL community champions ▪ Local entrepreneurs and artists, athletes and coaches, doctors and educators who are library users will share their personal stories of engagement with the library and how it has helped them meet their own goals ▪ Video testimonials will be shown on OPL website to demonstrate how their personal or professional interests are advanced by the Library ▪ They will focus on human stories and their own emotional (and practical) connection to the OPL – helping to make the OPL real for people (a key way to engage and get people talking) ▪ OPL will support with facts and messages 	<ul style="list-style-type: none"> ▪ Both internal and external audiences ▪ Representatives of target segments including business, teens, newcomers, parents 	<ul style="list-style-type: none"> ▪ Recruitment ongoing; begins summer 2012 ▪ Managers identify 'star patrons': June ▪ OPL 2011 online Annual Report with first video testimonials: July ▪ Video production and posting on website ongoing as opportunities arise 	<ul style="list-style-type: none"> ▪ Number of participants secured ▪ Level of participation ▪ Customer feedback ▪ Number of web visits
Partner Testimonials	OPL	<ul style="list-style-type: none"> ▪ Leaders of organizations which partner with OPL will share their professional stories of engagement with the library and how it has helped them meet their strategic objectives to serve their own customers ▪ Video testimonials will be shown on OPL website to demonstrate how their organization's agenda is advanced by the Library ▪ Leaders will also be invited to participate in OPL events, speaking engagements, and encouraged to use their own networks ▪ OPL will support with facts and messages 	<ul style="list-style-type: none"> ▪ OPH ▪ Newcomer agencies ▪ Museums and theatre partners 	<ul style="list-style-type: none"> ▪ Recruitment ongoing ▪ Video production and posting on website ongoing as opportunities arise 	<ul style="list-style-type: none"> ▪ Number of participants secured ▪ Level of participation ▪ Customer feedback

ENGAGEMENT					
Activity/Tool/Product	Responsibility	Description	Targets	Timeline	Performance Measures
Employee Spokespeople	OPL CCR & SDSE	<ul style="list-style-type: none"> ▪ A number of leaders working at all levels of the library will be identified to share their passion for their work and for their customers, and serve as visible symbols of the 'frontline' or 'behind-the-scenes' library employee ▪ Video testimonials will be shown on OPL website to demonstrate how their everyday work makes a difference to the people of Ottawa ▪ They will put a human face on the library and their own emotional (and professional) connection to the OPL's customers – helping to make the OPL real for people (a key way to engage and get people talking) ▪ Photographs of employee leaders may also be used in print materials to reinforce the message 	<ul style="list-style-type: none"> ▪ Both internal and external audiences ▪ Representatives of target segments including business, teens, newcomers, parents 	<ul style="list-style-type: none"> ▪ Recruitment ongoing begins summer 2012 ▪ OPL 2011 online Annual Report with first video testimonials: July ▪ Video production and posting on website ongoing as opportunities arise 	<ul style="list-style-type: none"> ▪ Willingness of employees to engage/ become spokespersons ▪ Number and tone of contributions to Agora
Community Events	OPL CCR & Branch managers	<ul style="list-style-type: none"> ▪ The OPL will identify opportunities to bring the community together at its hub: the public library branch ▪ City councillors will be invited to host or to participate in gatherings to celebrate significant anniversaries, new initiatives if appropriate ▪ If no milestone, event can be open house showcasing library offerings, demonstrating links with other community organizations ▪ Community media will be invited to each event ▪ Community businesses will be asked to provide complimentary refreshments 	<ul style="list-style-type: none"> ▪ Councillors ▪ Employees ▪ Community business leaders ▪ Community association leaders ▪ Top-tier donors ▪ FOPLA ▪ OPLF ▪ OPL board ▪ Media 	<ul style="list-style-type: none"> ▪ One per OPL cluster (or ward?) per year, beginning Fall 2012, as identified on OPL calendar 	<ul style="list-style-type: none"> ▪ Number of attendees ▪ Councillor feedback ▪ Community feedback

ENGAGEMENT					
Activity/Tool/Product	Responsibility	Description	Targets	Timeline	Performance Measures
Flashcards	OPL CCR	<ul style="list-style-type: none"> one-page flashcards that can be digitally posted on Facebook page, tweeted out, cards will include photographs, info graphic/profile, testimonial of customer spokesperson The photo will show, for example, a small business owner standing in front of the section of library - they use and the text will describe that person's personal story with the library (how they use it, how it helps them, etc). 	<ul style="list-style-type: none"> Employees Customers Community partners Volunteers Both internal and external audiences 	<ul style="list-style-type: none"> Ongoing, in parallel with videos 	<ul style="list-style-type: none"> Customer endorsements Positive emails, Tweets and Facebook posts
Councillor Updates	OPL CCR	<ul style="list-style-type: none"> Media advisories, press releases and public service announcements about OPL events, offerings and news are shared with city councillors with suggestions to incorporate into their communications with constituents 	<ul style="list-style-type: none"> Councillors and constituents 	<ul style="list-style-type: none"> Launched Spring 2012 Ongoing 	<ul style="list-style-type: none"> Number of uses of provided materials Councillor feedback Constituent feedback
E-Newsletters	OPL CCR	<ul style="list-style-type: none"> Encourage public to sign up for e-newsletter: focus on customers first Each month an e-newsletter will be sent out with activities/goings on at OPL 	<ul style="list-style-type: none"> Cardholders 	<ul style="list-style-type: none"> Business Services monthly e-Newsletter already in circulation Winter 2012 Monthly, ongoing 	<ul style="list-style-type: none"> Customer feedback
Agora Blog/Intranet	OPL employees	<ul style="list-style-type: none"> To encourage employee engagement and participation, the staff intranet site and blog will be used to share engagement initiatives Employees encouraged to tell their own stories of engagement and create pride/showcase employee engagement 	<ul style="list-style-type: none"> Employees 	<ul style="list-style-type: none"> Ongoing 	<ul style="list-style-type: none"> Employee participation

ENGAGEMENT					
Activity/Tool/Product	Responsibility	Description	Targets	Timeline	Performance Measures
Twitter Chat	OPL	<ul style="list-style-type: none"> ▪ OPL 'personality': Chair, CEO, Reader advisory librarian, genealogy specialist, and others will hold a live "Twitter chat" during which people will be encouraged to ask questions about the OPL, ask for reading advice, speak to an expert about its services ▪ A series of promotional Tweets will be sent out in advance of the chat ▪ Twitter followers will be invited via Twitter and encouraged to participate in the one-hour session. ▪ The chat will get the conversation going on line about the OPL, raise awareness of the surprises that exist within and online (services offered at the library, expert guides, innovation) ▪ CCR staff will serve as the chat hosts and facilitators 	<ul style="list-style-type: none"> ▪ Twitter followers 	<ul style="list-style-type: none"> ▪ Monthly (with a different personality each time) 	<ul style="list-style-type: none"> ▪ Participation in Twitter event
Dedicated 'Engagement' Section on Website	OPL CCR	<ul style="list-style-type: none"> ▪ A section of the renewed OPL website to be dedicated to Engagement <p>It will include:</p> <ul style="list-style-type: none"> ▪ a calendar of OPL events ▪ Testimonial videos ▪ Selected media coverage of OPL events and news ▪ Highlights of little-known facts about the library 	<ul style="list-style-type: none"> ▪ Customers ▪ Non-users ▪ Media 	<ul style="list-style-type: none"> ▪ Fall 2012 launch 	<ul style="list-style-type: none"> ▪ Visitor count ▪ Customer comments

ENGAGEMENT					
Activity/Tool/Product	Responsibility	Description	Targets	Timeline	Performance Measures
Contest	OPL CCR	<ul style="list-style-type: none"> ▪ A public engagement contest ▪ People will be encouraged to write a short piece or produce a YouTube video showing how the library is important to their life ▪ Prizes of branded OPL materials will be given ▪ The winning pieces can be quoted or posted in Twitter activity, Facebook pages, mentioned during speeches and interviews etc.) ▪ The goal with the dedicated page on the site is to get people engaged and sharing about their OPL experience ▪ The use of multiple voices and engaging them using multiple touch points will help raise the level of awareness ▪ Media will be advised of the contest with the goal of spreading the word of the contest to their audiences 	<ul style="list-style-type: none"> ▪ Customers ▪ Non-users ▪ Media 	<ul style="list-style-type: none"> ▪ 2013 ▪ (with new brand launch) 	<ul style="list-style-type: none"> ▪ Participation in contest ▪ Positive emails, Tweets and Facebook posts

ADVOCACY					
Activity/Tool/Product	Responsibility	Description	Targets	Timeline	Performance Measures
Media Tours	OPL CCR	<ul style="list-style-type: none"> ▪ Key media will be invited to tours of specific branches for insider briefings on today's library ▪ Offer behind-the-scenes tour of RFID, materials delivery, InfoService, and meeting reference and specialty librarians ▪ Include specialty media for newcomers, family oriented publications etc 	<ul style="list-style-type: none"> ▪ Citizens through media 	<ul style="list-style-type: none"> ▪ June 2012: Hazeldean ▪ and ongoing as opportunities arise 	<ul style="list-style-type: none"> ▪ Amount, scope and tone of media coverage
Tool Kit	OPL	<ul style="list-style-type: none"> ▪ A toolkit will be prepared for all OPL spokespeople (OPL board members, plus FOPLA, and OPLF members, management, etc) to use to guide their interviews, meetings, and editorial board meetings, presentations and speeches, etc. ▪ The kit will contain key messages, PowerPoint deck, draft script, etc. ▪ Key testimonials will be included to showcase the personal and emotional connection to the OPL 	<ul style="list-style-type: none"> ▪ Both internal and external audiences through ▪ OPL board members ▪ FOPLA ▪ OPLF ▪ Community spokespeople ▪ OPL leadership, managers 	<ul style="list-style-type: none"> ▪ Message development and consultation with OPL, OPLF, FOPLA Q3 2012 ▪ Full package ready for Q4 2012 	<ul style="list-style-type: none"> ▪ Number of uses of kit materials ▪ Feedback on usefulness ▪ Letters to the editor published ▪ OpEd pieces published ▪ Amount, scope and tone of media coverage
Editorial Boards	OPL CEO and high profile external advocates	<ul style="list-style-type: none"> ▪ A group of OPL champions will meet with local daily and community paper to tell the OPL story ▪ Key to link the meetings to city agenda or key issue (i.e. literacy month, day, innovation conferences – leadership) 	<ul style="list-style-type: none"> ▪ Local community newspapers ▪ French and English dailies 	<ul style="list-style-type: none"> ▪ October Library Month 	<ul style="list-style-type: none"> ▪ Amount, scope and tone of media coverage

BRANDING					
Activity/Tool/Product	Responsibility	Description	Targets	Timeline	Performance Measures
Promotional Campaigns	OPL CCR	<ul style="list-style-type: none"> ▪ Suites of materials possibly including poster, brochure, handout, booklists, web presence, display units are developed to present system-wide programs and offerings ▪ Target messages are refined for specific target groups, program objectives ▪ Templates offer flexible but consistent framework for branch-specific offerings 	<ul style="list-style-type: none"> ▪ Customers 	<ul style="list-style-type: none"> ▪ Ongoing based on program campaigns, OPL calendar 	<ul style="list-style-type: none"> ▪ Customer response ▪ Program attendance ▪ Employee feedback
Digital Signage	OPL CCR	<ul style="list-style-type: none"> ▪ A suite of high quality slides promoting featured OPL system-wide programs, services, databases and offerings is displayed on TV screens, digital photo frames, and two-way screens ▪ Templates offer flexible but consistent framework for branch-specific offerings ▪ Digital signage for 22 branches provided by FOPLA 	<ul style="list-style-type: none"> ▪ Branch customers 	<ul style="list-style-type: none"> ▪ Monthly updates ▪ Currently in 22 branches; ▪ Rollout to all 33 branches by end 2012 	<ul style="list-style-type: none"> ▪ Program attendance ▪ Employee feedback ▪ Customer feedback

BRANDING					
Activity/Tool/Product	Responsibility	Description	Targets	Timeline	Performance Measures
Logo	OPL CCR	<ul style="list-style-type: none"> ▪ With a goal to re-position the OPL, a new logo will inspire engagement and convey a consistent and modern feeling ▪ The logo – which defines key characteristics – is a visual ‘flag’ ▪ It is meant to be distinctive, memorable, signify value and allegiance ▪ Over time as replacement cycles permit, the logo/brand identity will be applied to all Library materials (i.e. bookmarks, pamphlets, e-newsletters, website, signage, annual report, mouse pads, T-shirts, library cards, Facebook page, book carts, stickers, magnets, etc.) 	<ul style="list-style-type: none"> ▪ Internal and external audiences 	<ul style="list-style-type: none"> ▪ 2013 launch ▪ Ongoing application 	<ul style="list-style-type: none"> ▪ Customer response ▪ Employee response
Tag Line	OPL CCR	<ul style="list-style-type: none"> ▪ In a clever, compelling way the line will serve to show how different individuals engage with today’s library offerings ▪ This tag line will be used to provide an overarching theme for all the Library’s messages ▪ It must be inclusive enough to accompany entire spectrum of Library offerings ▪ It is meant to brand the Library and serve as a catalyst to opening up the dialogue and make people feel personally connected to it ▪ It will be used in tandem with the new OPL logo 	<ul style="list-style-type: none"> ▪ Employees ▪ Customers ▪ Community partners ▪ Volunteers ▪ Both internal and external audiences 	<ul style="list-style-type: none"> ▪ 2013 launch 	<ul style="list-style-type: none"> ▪ Customer response ▪ Employee response