

## Why Advocacy Should Be a Best Practice of Museums

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Do you believe that museums aren't just nice community assets, but rather they are essential to our country and the quality of life of our citizens? What are you doing to ensure that others share that view?

Museums typically embrace their educational role and commitment to engaging people of all ages in exploring, learning, and discovering history, art, nature, and the world around us. Interacting with elected officials and community leaders and helping them better understand the value of museums to their constituents should be a natural extension of that educational responsibility. Yet, many museum staff and board members shy away from advocacy and engaging with elected officials on an ongoing basis.

There are many reasons for this lack of involvement. Some believe advocacy just isn't relevant or important. Many believe it is not a permissible activity for nonprofit organizations. Others aren't comfortable doing it. Some people are overwhelmed with day-to-day pressures and don't consider it a priority to make time for this activity. These misunderstandings and barriers must be overcome. Advocacy needs to be an ongoing responsibility of everyone who cares about museums—staff, board members, volunteers, constituents, and the wide range of individuals who value museums.

### What Is Advocacy?

Simply stated, advocacy is communicating with broad constituencies about what your museum does and why it is important. Webster's dictionary defines advocacy as the act or process of advocating or supporting a cause or proposal. Lobbying is a subset of advocacy and typically involves attempting to influence specific legislation.

### Why Advocacy Is Relevant

Too often, museum leaders deem advocacy unimportant because their institutions don't receive government money. However, laws are routinely passed and policies put in place that directly affect museums. For example, Illinois recently passed concealed carry legislation, and museums need to be aware of their rights and responsibilities under this law. The Illinois Right to Breastfeed Act provides specific rights to breastfeeding mothers, which impacts how museums treat women who breastfeed at museums. School funding and educational testing requirements have dramatic impacts on the ability of schools to take field trips to museums. Congress is considering significant

changes to the tax deductibility of charitable gifts, and this could have a significant effect on donations to museums and other not-for-profit organizations.

Legislation was introduced in the Illinois General Assembly that would have made not-for-profit organizations subject to the Freedom of Information Act. In Missouri, legislation was introduced that would have given the state auditor the power to audit any museum and would have imposed onerous record-keeping requirements on all museums. Periodically there are proposed changes to state or local laws that could affect the tax-exempt status or property tax exemption for not-for-profits or specific museums. There are numerous grant programs at the local, state, and national levels that require appropriations by legislative bodies and rule making by government agencies.

Changes to policies and laws are constantly under consideration by school boards, local units of government, state legislatures, and Congress. Many have the potential to affect museums in significant ways. Despite numerous connections between legislation and museums, museums are often not involved in the deliberations. It behooves museums to be engaged in the process and have their voices heard.

### Rights of Nonprofits to Advocate and Lobby

Although some people believe that not-for-profit organizations cannot engage in lobbying and advocacy, this is not the case. The Chicago-based Donors Forum issued a report, *Can I Lobby?*, which clearly addresses this point. The report noted that "non-profits play a vital role in the development and implementation of public policy. Advocacy and lobbying, within certain constraints, are legal for nonprofit organizations and conducive to an informed, healthy, and strong democratic society. Donors Forum supports the advocacy rights of nonprofits and believes that nonprofits can and should participate in public policy dialogue that affects their organizations, communities, and the people they serve."

What nonprofits cannot do is engage in political campaign activity, endorse candidates, or take part in partisan political activities. Otherwise it is your right—indeed, it is your *responsibility*—to advocate on behalf of your museum and the museum field.

The Center for Lobbying in the Public Interest is a good source of information on federal requirements and limitations on lobbying. The

1976 federal lobby law makes it clear that not-for-profits can lobby. It also sets limits on the amount of money that nonprofits may spend on lobbying provided they elect to file a form under Section 501(h) of the Internal Revenue Code. Not-for-profits can make lobbying expenditures up to 20 percent of the first \$500,000 of their annual charitable expenditures, 15 percent of the next \$500,000, and so on. Organizations that don't file the 501(h) form must have insubstantial expenses for lobbying. For many museums, lobbying expenditures are indeed insubstantial. Because this is vague and undefined, not-for-profit organizations that do expend funds for lobbying are advised to elect to come under the 1976 federal lobby law and file the one-page simple form.

## Becoming Comfortable with Advocacy

If this all sounds somewhat daunting, realize that you can play an important role by simply getting more engaged with state, regional, and national museum organizations that are sponsoring advocacy training programs, tracking public issue issues, sending out alerts, and letting you know how you can get involved. The first step is to become more comfortable with advocacy.

There are numerous opportunities to participate in advocacy training. The Illinois Association of Museums (IAM), in partnership with Museums in the Park and the Illinois State Museum, sponsors an annual Museum Day in Springfield. This is typically held in March, and advocacy training is an important component of it. Arts Alliance Illinois has conducted advocacy training workshops at Museum Day for the past several years, helping people who are new to the process to become more comfortable engaging in advocacy activities.

Annual conferences sponsored by the Illinois Association of Museums, Association of Midwest Museums, American Alliance of Museums (AAM), and other organizations routinely include sessions on advocacy among their program offerings. Unfortunately, too often the people who would most benefit from these sessions aren't in the audience. Museum associations periodically offer workshops, seminars, webinars, and other opportunities to learn more about advocacy and to help museum staff and board members become more confident in adopting advocacy as an ongoing practice.

## Advocacy through Participation in Fieldwide Initiatives

Although organizations of all types are continually advocating for their own interests at the local level, in statehouses throughout the country, and on Capitol Hill, museums have come late to this process. But, over the last five years, with strong leadership from the American Alliance of Museums and partnerships with other national, regional, and state associations, there is a much stronger voice advocating for museums.

The most effective advocacy organizations have a strong network of people at the grass-roots level expressing a consistent message. Since museums are located in communities of all types and sizes throughout the country, they have the potential to form an effective network supporting the broader advocacy efforts of our professional museum organizations. However, for this to be successful, everyone needs to be involved.

There are many simple ways to support fieldwide advocacy on behalf of museums. For example, respond to surveys conducted by professional museum organizations. The Illinois Association of Museums surveyed museums throughout the state in order to develop a state-wide economic impact statement documenting the significant contributions of Illinois museums. The survey posed a few simple ques-

tions and subsequently revealed the following compelling statistics. Illinois museums employ 6,500 Illinoisans; spend over \$548,155,000 annually in goods and services; serve more than 20,350,000 visitors annually; serve more than 2,610,000 schoolchildren each year; and serve more than 121,300 teachers each year.

This information had a big impact. When this data was released, articles appeared in newspapers all over the state. The message about the significance of museums was very powerful, but it took a united effort to document this data. Approximately 175 museums responded to the survey, and their names were listed on the survey when it was distributed to members of the Illinois General Assembly during the annual Museum Day. There are far more than 175 museums in Illinois. All museums should participate in future surveys. By taking part, your institution will be included in the long list of museums in Illinois that are having a positive economic and educational impact.

Lending your voice to broader fieldwide initiatives is important in building a strong grass-roots advocacy network. The AAM and other organizations are working hard to make it as simple as possible to participate. Other ways to support the efforts include the following:

- Sign up on the AAM website to receive advocacy alerts.
- Respond to the calls to action to lend your voice to issues of concern.
- Participate in advocacy days at the local, state, and national levels in order to learn more about what is happening and how you can get involved.
- Attend the advocacy sessions at professional conferences or advocacy workshops and webinars sponsored by state, regional, and national museum organizations.
- If you receive a competitive government grant, make sure elected officials who vote for the funding know what you have accomplished with the grant funds and how you have served their constituents.

Museums lament the fact that there are limited dollars and intense competition for grants from the Institute of Museum and Library Services (IMLS). Yet, over the years that these grants have funded projects, what have museums done to convey the tangible results of these initiatives to members of Congress who vote for the appropriation? If there is any hope of increasing the funds for IMLS grants, museums must tell their members of Congress about the ways these grants benefit their constituents. Likewise elected officials at the state and local levels need to hear stories about the results of grants funded with state and local government dollars. Especially in times of intense competition for government funds, elected officials can't be expected to vote to appropriate dollars for grant programs if they don't know what has been accomplished with the funds. It is our responsibility to make sure that elected officials are aware of the tangible results of museum projects funded through government grants.

Communicating collective results has an even greater impact. Illinois has been well represented by a diversity of museums each year at Museums Advocacy Day, which is held annually in Washington, D.C., under the sponsorship of the AAM. Our delegations of Illinois museums have reported to congressional members the results and impacts of IMLS grants throughout the state. We learned that one congressional district in Chicago receives more IMLS grants than any other district nationwide. This is important information to convey to members of the Illinois congressional delegation. "Dear Colleague" letters are an important means of enlisting support for initiatives in Congress. As a result of our advocacy efforts, a number of Illinois members of Congress signed the Dear Colleague letter initiated by AAM in support of increased funding for IMLS grants to museums.

There is great value in joining with hundreds of museum colleagues throughout the country for Museums Advocacy Day on Capitol Hill. In addition to making legislative visits, attendees can take advantage of advocacy training, informative presentations by federal agencies on issues affecting the museum field, and opportunities to network with friends and colleagues. It is an invigorating experience. If you have not attended one of these events, consider going to the next Museums Advocacy Day. The AAM website listed at the end of this technical insert gives the dates for each year's event.

### Advocacy Is Like Donor Cultivation

Advocacy is all about developing relationships, especially with elected officials at all levels. In many ways it is like donor cultivation. Just as you get to know individuals and their interests, passions, and motivations before asking them for financial support for your museum, you need to do the same with elected officials. What motivated them to run for public office? What are their interests? On what committees do they serve? Are they concerned about public education? Do they home school their children? Are they interested in local history? Are they concerned about tourism and economic development? Museums have many messages and stories to tell. You can be most successful by tailoring your message to elected officials based on understanding them as individuals and their interests and concerns. Just as you cultivate donors before you ask for support, museums need to cultivate elected officials and get to know them before asking for support.

Here are tips for communicating with legislators:

- Meet legislators early on, when they are first running for office.
- Learn their backgrounds and interests.
- Target your message at their concerns and interests.
- Document how you serve their constituents.
- Enlist their constituents to tell your story and humanize your impact.
- Realize that many will move up to higher positions. Many people who worked in and around state government knew Barack Obama when he was a state senator. Congressman Aaron Schock got his start as a nineteen-year-old member of the school board in Peoria before he became a state legislator and then a member of the U.S. House of Representatives.
- Always be honest.
- If you don't know the answer to a question, follow up later with the answer.
- Say thank you. Say it often.

### Advocacy Is Also Like Disaster Planning

A colleague mentioned to me that with donor cultivation there is an anticipated benefit in the future that warrants the investment of time. In contrast, the long-term benefit of cultivating elected officials is less obvious. Therefore, it is harder to invest the time when the anticipated benefit, such as future financial support, is less clear. I pointed out that advocacy can be similar to disaster planning. Getting to know elected officials and cultivating relationships can set the stage for positive benefits and potential support. Just as you purchase car insurance in case of an accident, developing a solid relationship with elected officials can be something like taking out an insurance policy. The first time you meet an elected official should not be when you have a problem or are asking for something. In the event an adverse policy decision or legislative initiative comes into play that could affect your museum, it is far easier and more effective to explain your concerns to someone you have a relationship with than to someone you are meeting for the first time.

Unfortunately, given the challenges facing government at all levels, there is great potential for legislation or policies to affect museums adversely—either intentionally or unintentionally. Having relationships with elected officials (and their staff) at all levels of government is a wise investment for the future.

### Make Your Organization's Value Known

Whether asking elected officials for support, or requesting assistance in time of crisis, it is essential that you help those officials to understand and appreciate the value of your organization to your community and their constituents. People don't learn by osmosis, and we can't simply *expect* community leaders and elected officials to know about our organizations. It is our responsibility to provide many opportunities for that to happen. Engaging with elected officials and advocacy is not something to do just once a year; it is an ongoing responsibility.

A colleague who works at a not-for-profit museum that receives some local tax dollars was dealing with a difficult situation when there were cuts in the local funding. When I asked what she might have done differently if she had known this would be an issue, she replied, "Have coffee with the mayor more often." In times of trouble, it is far easier to approach someone who knows you on a first-name basis and understands the value of your institution than someone who hasn't met you before or who doesn't know about your organization.

Another worthwhile strategy is to engage elected officials in advocacy with other elected officials. School board members can be effective in communicating the significance of your organization to the mayor and local aldermen. The mayor can be a spokesperson on your behalf to members of the state legislature. Look for opportunities for elected officials, community leaders, and others with influence to tell your story and share your message.

### Advocacy as an Ongoing Operation

Rosetta Thurman, a nationally recognized author and speaker, gave a presentation at a nonprofit conference in Springfield, Illinois. She commented about nonprofits' continually lamenting that they face the challenge of doing more with less. She suggested a different approach: do more with more. She emphasized that by empowering all ages and ranges of people involved with your organization—from junior to senior staff, board members, volunteers, and people you serve—you can do more with more.

The Johns Hopkins University Listening Post Project conducts periodic surveys of nonprofit organizations throughout the country, providing valuable insights into many issues facing the nonprofit sector. Recognizing the importance of advocacy and public policy, the Listening Post conducted several surveys and issued reports and communiqués focused specifically on advocacy, public policy, and nonprofits. Communiqué 13, *Report on the Nonprofit Advocacy Roundtable*, noted that "effective advocacy is about relationship building." Board members are critical assets in the advocacy relationship since elected officials are often influenced by a visit from a board member more than from a paid staff member. This survey also documented the powerful impact of museum visitors' stories. The Listening Post's report titled *Building Advocacy from Within* discussed the value of making advocacy a priority and building it into the culture of the organization.

By embracing advocacy and making it part of your organization's culture, you can find time to be a valuable advocate for your museum. There are many opportunities to do simple things. The key is to do them often. Here are some ways to advocate:

- Add elected officials to your mailing list.
- Send a congratulatory letter following elections to local, state, and federal officials. Include officials not only in the district where your museum is located but in the districts of the constituents you serve (such as schools in surrounding communities).
- Invite elected officials to visit your museum—not just for a reception or social event, but to see a specific program in action or at a time their constituents will be at your museum.
- Complete a simple economic impact statement for your institution. The AAM website offers a template along with sample economic impact statements from various museums.
- Find a reason to send a handwritten note to elected officials.
- Take a picture of a school group visiting your museum and send it with a note to the elected official whose district includes that school.
- Make sure you know who represents the district where your museum is located. You can find your state and federal elected officials by entering your zip code in a link on the advocacy section of the AAM website.
- Clip newspaper articles about your museum and send them to elected officials in your area. Attach a handwritten note.
- Ask elected officials to put your brochures, posters, and publications in their offices.
- Ask elected officials to sponsor a resolution or proclamation in recognition of an anniversary or special event.
- Offer your museum to be the local venue for the Congressional Art Competition, a nationwide high school arts contest sponsored by the U.S. House of Representatives. If your member participates, offer to host the exhibition, serve as a judge, or support the initiative in other ways.
- Compile testimonials you receive from visitors, teachers, and schools, and send those to elected officials.
- Visit state legislators in their home districts when they are not in session.
- Invite members of Congress to visit your museum when they are back in their home district. For the past few years, AAM has been promoting this nationally during the August congressional recess.
- If you can't go to AAM Museums Advocacy Day in Washington, D.C., ask to meet with staff in the local congressional office and share the issue papers developed by AAM describing issues of concern to museums.
- Get to know legislative staff. They are the eyes and ears of the elected official and play an important role in scheduling and issue analysis. They may become elected officials themselves. Never underestimate the importance of a meeting with staff, and cultivate those relationships as you would with elected officials.
- Take advantage of the many tools and resources on the AAM website. Peruse the advocacy site, read the issue papers, sign up for advocacy alerts, download the templates to create your own educational impact statement and economic impact statement, and determine how you can best use the resources to advocate on behalf of your own institution.
- Respond to calls to action by AAM and other museum associations, and use their tips and tools to respond with a minimal investment of time.
- Incorporate advocacy into the job descriptions of your board members.
- Invite people with advocacy skills to serve on your board.
- Put advocacy on the agenda of your board meeting.
- Create a simple advocacy plan for the coming year by listing at least one thing you will do every month in support of advocacy.
- Don't do it alone!

Ford Bell, president and CEO of the American Alliance of Museums, launched the Write One Letter campaign. He is asking everyone who works in museums, serves on museum boards, or just loves museums to write one letter and then ask the recipient to do the same. These letters can go to any public official who would benefit from knowing more about the effect your institution has on your community. Collectively, these letters can be very influential.

The people you serve can be your best advocates. Don't be shy about asking them. Donors don't give unless they are asked, and this is the same with advocacy. Enlist your constituents to tell your story. For example, ask a teacher who has had a great experience at your museum to send a letter about it to the school board or state legislator. Ask a visitor who compliments you about your museum to write a letter to the editor of your local newspaper. Continually look for opportunities to ask others to help tell your story and advocate on your behalf.

## Conclusion

If we are committed to ensuring the best possible future for museums, advocacy must be a best practice of U.S. museums. Ford Bell stated this well in the November–December 2010 issue of *Museum*: “Museums must maintain a consistent and relentless drumbeat of communication to our civic leaders, extolling the value of museums.”

Ensure a strong future for museums. Help beat the drum!

## References and Recommended Reading

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## About the Author

Karen Ackerman Witter retired from the State of Illinois after thirty-five years of service. As natural resources policy advisor to Governor James Thompson and director of a cabinet-level state agency, she was deeply involved with governmental affairs and public policy. She was the associate director of the Illinois State Museum for fourteen years. She has served in leadership roles on the boards of the Illinois Association of Museums and the Association of Midwest Museums and has participated extensively in advocacy initiatives of the American Alliance of Museums. She is a frequent presenter about advocacy at state, regional, and national museum association conferences.