Advocacy Policy Template and Action Guide

Reconsidering Museums Toolkit

2023

Advocacy Policy Template and Action Guide

Introduction

Reconsidering Museums, a three-year national project, sets out to answer the question, what do museums mean to Canadians? Through a rearticulation of the value of museums and a rebrand of the sector, this project aims to support museums with the tools and language necessary to better connect with and serve their communities, deepening their relationship, and therefore their relevance, to the Canadian public.

The resources developed through this project will provide adaptable values-based messaging that bridges the gap between museums and their publics, substantiates the value of museums with data-driven insights, and helps shape public dialogue around the vital role of museums in our society.

The Advocacy Policy Template and Action Guide is one of the resources that we have created as part of *Reconsidering Museums*. This Advocacy Guide was developed to support the work that museums *should* consider doing to transform today, for a resilient tomorrow, in terms of its work around advocacy.

All data collected as part of a 2021 national survey, *Museums for Me*, undertaken as part of *Reconsidering Museums*. For detailed information on questions and responses, see the *Museums For Me: Engaging Canadians on the Future of Museums – What We Heard* report. The Advocacy Policy Template and Action Guide was created for *Reconsidering Museums* in partnership with Hatlie Group.

What is Advocacy?

Advocacy relates to how a museum is actively working to advance a particular cause or issue to change opinion, policy, or practice. Within this Guide, advocacy is defined broadly because advocacy can take on many different forms depending on a museum's circumstance or place in its community. Every museum will advocate differently and work on various social and environmental issues, including, but not limited to climate change, Indigenous issues and reconciliation, 2SLGBTQIA+ issues, local community issues, etc. A museum may also wish to advocate for internal or industry-wide relations such as financial support, staff and Board support, etc.

For the purposes of this Guide, the two types of advocacy explored—internal (for a museum's specific needs) and external (addressing community or social issues)—are separated within the policy templates; however, the actions for advocating, whether internal or external, are the same.

Purpose of the Advocacy Policy Template and Action Guide

No matter what you are advocating for and whether you are new to advocacy or have been practicing it for some time, this Advocacy Policy Template and Action Guide will support your museum. It is intended to support museums at any stage, of any size, and in any place. While not all museums operate exactly the same way, there are considerations that all museums can and should reflect on when it comes to advocacy.

In his blog post, "Museums Won't Risk Doing Anything That Might Alienate Their Audience," Dr. Robert R. Janes states that "...neutrality has conspired to create a magical belief that is now the stock-in-trade of most museum workers. This belief is that museums may abstain from addressing societal issues and aspirations, because they have complex histories and unique missions which absolve them from greater accountability."[1] Being accountable is key, and museums have a responsibility to help educate, raise awareness, and bridge the gap between science and culture.[2]

Canadians believe that museums have a responsibility to educate the public on art, nature, and history, as well as to address social and economic issues to help support education.[3] With this in mind, we must consider how museums can better advocate and educate the public today to build a more resilient tomorrow. Museums are integral cultural institutions with the power to take a stance on a plethora of issues that their communities are experiencing. Communities need the support of their museums to amplify voices and raise awareness on important topics.

The purpose of this Guide is to help museums self-identify where they are at in their advocacy journey and to provide insights and examples on how they may go about conducting advocacy and developing an Advocacy Policy to make real and lasting change. It is time for museums to speak up and out on issues that support their mission and their communities—to take a stance on these issues and not remain neutral, especially in times when immediate support is needed.

---

[1] Robert R. Janes, "The Elephant in the Room — Museums Won't Risk Doing Anything That Might Alienate Their Audience," Coalition of Museums for Climate Justice (blog), April 19, 2017, https://cmcj.ca/the-elephant-in-the-room/.
[2] Robert R. Janes, "What Are We Waiting For?? An Open Letter to Canadian Museum and Gallery Directors from Robert R. Janes, Founder of the Coalition of Museums for Climate Justice," Coalition of Museums for Climate Justice (blog), February 22, 2021, https://cmcj.ca/what-are-we-waiting-for-an-open-letter-to-canadian-museum-and-gallery-directors-from-robert-r-janes-founder-of-the-coalition-of-museums-for-climate-justice/.
[3] Alberta Museums Association, "What We Heard Report," *Museums For Me: Engaging Canadians on the Future of Museums,* prepared by Hill+Knowlton Strategies, June 2021, https://www.museums.ab.ca/media/163967/what_we_heard_report_wappendix.pdf.

How to Use This Guide

The information included within this Guide, from the policy template to the action steps checklist, are to provide museums with the right questions to ask, to provide guidance on thinking about how to approach advocacy work, and to define what is needed (resources, capacity, budget, etc.) to be successful. Each museum's circumstances, from Board member experience with advocacy to community relationships, will inform how involved the museum will become.

The Five Cs included in the Guide are the starting point for meaningful and intentional discussion with your Board of Directors, with your staff, and with your communities. Additional resources are available on the *Reconsidering Museums* website, and contact information is provided if you have any questions.

Actioning Advocacy

Based on extensive research in developing this Advocacy Policy Template and Action Guide, three outstanding themes emerged:

It's not always about money. Museums and organizations must go beyond advocating for funding from governments. Advocacy, as defined in this Guide, can and should take many forms, including asking for additional resources (those outside of direct funding), educating the public, and working to change a government policy. Think about what matters most to your organization and then understand what resources you may need. While money is likely important, how else do you make an impact in your community?

Community collaboration. Advocacy actions require understanding and relying on community. Museums need to actively engage with their immediate communities and understand the current needs that exist. Museums can then work in tandem with communities to educate, advocate, and help resolve pressing issues in a way that is grounded in mutual understanding. What needs does your community have?

Empowered employees advocate. Museums must put efforts and focus on supporting their employees through advocacy work. This includes paying fair and just wages, advocating for long-term and full-time contracts so that people can better plan for the future, and supporting them with new education when their attention is needed on specific projects that could be related to advocacy. Engaging employee interests and passions is also important to understand which advocacy issues are important to them. How are you working with your employees so that they are prepared and engaged to advocate?

Advocacy Phases

There are a number of foundational considerations for an organization, its Board, and staff to step into the work of advocacy. The following phases are important and essential in order for museums to be successful with their advocacy work. Advocacy comes in many different forms. Whether you are advocating for greater representation of a community group, diversity, a social cause, climate change, and / or funding, consider the Five Cs below prior to developing an Advocacy Action Plan. The Five Cs should also be considered prior to developing and approving an Advocacy Policy.

The Five Cs:

1. Considerations
2. Consciousness
3. Courage
4. Conversation & Collaboration
5. Clarity

The order of these themes is strategic and is meant to help set a direction for an organization to assess where they are within their advocacy journey. The idea is that without the first C, it will be challenging to do the second C, and so on. Use the Five Cs as guides and reflect on the 'things to consider' when your museum is drafting an Advocacy Policy and then actioning the steps that have been identified.

1. Considerations

The first C, Considerations, should come first and foremost when thinking about advocacy. As a museum serving the public, particularly when it comes to how you advocate and conduct your operations, considerations include communities who have historically been marginalized as well as societal issues that museums must better align themselves with. The considerations listed below are not exhaustive, and other important social connections and issues can certainly be added to this list, but it is imperative that you understand how your museum supports, and in turn advocates for, the following:

- Diversity, equity, inclusion, and justice
- Reconciliation and support for Indigenous communities
- 2SLGBTQIA+
- Accessibility (physical, intellectual, financial)
- Climate emergency

The following questions are meant to help as a starting discussion internally with your museum staff, prompting further discussion and discovery when it comes to addressing important, topical, and non-negotiable considerations:

a. Is our work inclusive of all communities, and does it speak to the successes and injustices of marginalized communities, particularly Black, Indigenous, and People of Colour (BIPOC)? 2SLGBTQIA+ communities and history? Does it include voices from these communities? Does our team involve individuals from these communities?

b. Have we considered our role in Indigenous relations and reconciliation? Have we reflected deeply on it, and are we making active efforts to support Indigenous communities in our immediate lands and beyond? Have we looked at the Truth and Reconciliation Commission's 94 Calls to Action, and are we working in alignment with these calls?

c. What resources do we have to support advocacy towards the climate emergency? Can we further educate and transmit information through our exhibits and programs to help the community learn and take active steps to correcting climate change?

2. Consciousness

Having consciousness refers to how your organization understands what it cares about most and how it then serves its true purpose through that mutual understanding. It is also twofold; developing personal agency as well as building on cultural literacy as it relates to your interests and your museum's vision and mission.

Without understanding what issues matter most to your organization, you may find it challenging to address any advocacy issues entirely. Dr. Janes writes that an Advocacy Policy would help "delineate what issues are important and how your museum will respond when confronted with moral and civic challenges."[4] While we cannot always predict what social, political, or economic challenges may arise, it is your responsibility as a team to understand what your organization's values are. It is also your responsibility to understand what your values are not, so as to understand when you are in misalignment with your values and can then act on correcting your actions. Therefore, it is not enough to remain neutral as a museum if you want to see change.[5] Taking a stance on issues that are impacting your community is important and integral for you as a museum.

So how do you get everyone on the same, or a similar, page? Have open discussions with your current team, and with new hires as well, on what matters to them. Alignment of personal beliefs with organizational ones is important. This is all part of building **Personal Agency**[6] within your organization, where everyone is comfortable sharing their personal opinions on current issues and has the agency to speak up about these issues. With personal agency, your team is able to really know the issue(s) that it wants to bring awareness to. Knowing the issue and what is needed to facilitate a change to the issue is essential for your organization's success in advocacy.[7]

As you step into these conversations, there is a need for good facilitation so that everyone feels safe and comfortable to share, and to be vulnerable if there is a lived experience or personal connection to the issues being discussed. If facilitation skills are not currently available on your team, consider bringing in additional support to create a safe environment for staff and / or Board to enter into the discussions.

As part of consciousness, it is a museum's responsibility to support building **Cultural Literacy**[8]—how are you helping to build awareness of the importance of the arts and cultural sector in the community, and then helping your visitors to build critical perspectives? To be successful with your advocacy work, you

---

[4] Robert R. Janes., "The Elephant in the Room — Museums Won't Risk Doing Anything That Might Alienate Their Audience."
[5] Robert R. Janes., "The Elephant in the Room."
[6] Robert Janes in discussion with the author, July 2022.
[7] SaskCulture, "Advocacy & Changing Public Policy," accessed September 18, 2022, https://www.saskculture.ca/programs/organizational-support/organizational-resources?resource=4.
[8] Ryan Hunt in discussion with the author; cultural literacy definition attributed to Patricia Huntsman, www.patriciahuntsman.com, July 2022.

need your communities to also care about your museum and its purpose, as well as what programming and exhibits you are putting out into the community.

Understanding what you stand for as an organization will enhance how you support the public through your museum's efforts. Here are some guiding discussion questions to start your journey towards consciousness:

a. What do we care about as an organization? What are the commonalities amongst us all?

b. What are my values? What are my museum's values? Are they aligned?

c. What is happening around us? Socially? Economically? Politically? Environmentally? Injustices? Successes?

d. What do our vision, mission, and goal statements say? Do they align with what we all care about and what is happening around us?

e. What should we be doing as an institution? With all this in mind, what should we stop doing as an institution?

The connection to organizational values cannot be understated. A clearly articulated values statement can provide direction to Board and staff on why, how, and what actions the museum is willing and open to take when it comes to social issues. An Advocacy Policy needs to be in alignment with these values and should directly support living these values.

For consideration: *Conflict of Interest*. Refer to your museum's Conflict of Interest Policy (for both governance and for operations) to ensure individuals have the opportunity to declare if there is a real or perceived conflict with any of the issues you are planning to advocate for with the community. If you do not have a Conflict of Interest Policy, work with the Board to develop and approve one to support the fiduciary responsibility of the Board to the organization.

3. Courage

Courage is the ability of your organization to take risks and to step into action even though you know it might not work out the way you had anticipated. Whether you are advocating for your organization (internally) or for a social / community issue (externally), risk-taking is a necessary step in order to incite real change. A lot of advocacy work that museums undertake is a form of allyship: supporting and standing up for issues that your immediate community is facing. With that in mind, museums must take

on forms of allyship that are honest, active, and supportive for their communities, and not merely performative (meaning that it is in words only and not actions).

Allyship, and in turn advocacy, is "about being willing to be unsettled and to accept guilt without being paralyzed into inaction. Being an ally means embracing risk."[9]

Through building courage, you will find it easier to be agile and responsive in many situations. It certainly takes a lot of care, attention, and courage to be able to make decisions on the fly when it comes to advocacy, particularly because we are responsible for the actions we take. But it is also a detriment if your museum cannot act in a timely manner.

Museums must embrace courage to take action, stay agile, and remain resilient in their advocacy efforts.[10] Here are some guiding questions to ask yourself about how your museum is currently embracing courage:

a. Are we afraid to act when there is a community crisis? In the past, how have we responded and supported the community when there was a need?

b. Are we afraid of our public image being impacted negatively? What makes us afraid? How can we address it internally?

c. Have we been criticized for anything in the past? Have we adapted to change this?

d. Who or what is blocking our ability to take action? How can we have a conversation with them about it?

4. Conversation & Collaboration

Now that you have looked internally, assessed what your values and priorities are, and understand your risk tolerance, it is integral to build and form relationships with your immediate communities through conversation and collaboration. Whether your museum's mission is to support a specific community or not, it is important to understand who is attending your museum, and more importantly, who is not attending your museum but is being affected by any social, financial, or political issues in your immediate community. Who your community is made up of can vary and change, and it is quite often

---

[9] Grayson Dirk, "Do It Off Broadway: Exploring the Politics of Diversity and Inclusion in Museums through Risk, Advocacy, and Queer Experience," Master's thesis, University of Washington, 2018, https://digital.lib.washington.edu/researchworks/bitstream/handle/1773/42004/Dirk_washington_0250O_18689.pdf?sequence=1.

[10] Robert Ferguson and Robert R. Janes, "Opinion: Plight of the Museum: Why Won't These Institutions Use Their Voices?," *The Globe and Mail*, February 4, 2022, https://www.theglobeandmail.com/opinion/article-plight-of-the-museum-why-wont-these-institutions-use-their-voices/.

dependent on your geographical location and broad mission. In the book *Museum Activism*, the notion of the museum as a vehicle to actively and intentionally do something for the benefit of society is openly discussed.[11] Activist practice may be controversial for some; the idea that museums are not neutral is a stand that has been expanding within the sector, and with a number of social movements gaining significant traction over the past few years, is becoming not just a slogan but an active way of working.

> "A growing body of research is revealing the powerful part museums play in engaging visitors in dialogue surrounding contemporary social issues, and in shaping the way we see, think about, and act towards others and the world around us. This, in turn, is stimulating professional debate and experimental practice around the potential museums hold to bring about progressive change."[12]

At their core, museums help communities better understand the world through art, history, exploring current events and more, thus making it imperative to develop strong community relationships so that the stories and exhibitions you share are authentic and true to the community.

In having conversations and developing collaborative efforts with communities, it is important to note that trust is key, but that it takes time to develop. As a museum, it is important to not rush into forming collaborations without having trust with the community you want to work with. This is especially true and highlighted for building relationships with Indigenous communities.[13] It is also important to have the right intentions when approaching your community; this would have been built into your internal assessments (consciousness and courage) and would continue as you work through building relationships with your communities.

Approaching a community requires you to ally with them—to understand what their needs are and what they may be struggling with. Ask what issues they are facing and how the museum can help them with addressing these issues. Do not put your preconceived ideas of that community's issue onto them. Consider all of your assumptions, and biases, before you approach a conversation; what you think a community may be facing could be incorrect. It is necessary to have conversations where you are listening, and only then to share your resources to support that community through allyship and advocacy.

You may also consider working across social movement boundaries and bringing together your values with those of multiple communities for stronger voices when advocating. It would also be important to identify local leaders who are not only government officials. Think about other people with influence

---

[11] Robert R. Janes and Richard Sandell, *Museum Activism* (Abingdon, Oxon: Routledge, 2019).
[12] Janes and Sandell, *Museum Activism*, xxvii.
[13] Bianca Message, "Designing for Specific Audiences: Working with Indigenous Cultures," *Muse Magazine,* Canadian Museums Association (July/August 2018), https://www.museums.ca/site/designing_audiences.

who are living and working in your community with whom you can also connect (teachers, business owners, activists, and others).[14]

Lastly, collaborating with communities also entails making space for the community to have an active role in your advocacy work as well. Mutually agree on ideas, listen, offer your support as a museum, and get the broader community (your museum visitors, for example) involved.

For Consideration: It is imperative in your communication and collaboration work that you do not abuse your relationships with community groups, especially those from equity-seeking communities. Recognize if you are asking for *education* or *collaboration*, and offer compensation to individuals who are working to offer you support when you are asking for education. Listen more than you speak; what the community's needs are should come before what you as a museum want to do, as what you want to do may not actually be helpful to the community. Finally, understand if what you are putting into the world is a form of appropriation; have you taken something that belongs to another group for your own use, or have you taken an element from another cultural context and used it as your own?[15]

Here are some guiding questions you should ask before approaching and collaborating with communities:

a.   What community groups are being impacted in our community? What people / organizations are already doing work to support these groups?

b.   What relationships do we already have as a museum? How can we strengthen those and better support these communities?

c.   Why do we as a museum want to support these identified groups? Are our intentions clear? What resources do we need in order to be successful?

d.   How can we adjust our priorities from *our* needs to *their* needs?

5. Clarity

Having clarity can finally take place when you have assessed and addressed what you are doing as an organization and when you have started to do the work with your communities. Clarity is about being

---

[14] Americans for the Arts, Arts Education Navigator: "Mobilizing Support," 2015, https://www.americansforthearts.org/by-program/networks-and-councils/arts-education-network/tools-resources/arts-ed-navigator/mobilizing-support.

[15] Intellectual Property Issues in Cultural Heritage Project, *Think before You Appropriate: Things to Know and Questions to Ask in Order to Avoid Misappropriating Indigenous Cultural Heritage* (Simon Fraser University: Vancouver, 2015), https://www.carfac.ca/carfacwp2019/wp-content/uploads/Think-Before-You-Appropriate.pdf.

transparent about the work you are doing to continue the conversation and build trust with your museum attendees. It is not an end but merely a continuation of the work; with more clarity comes more trust, and therefore you are able to build stronger and more meaningful relationships with your community.

It is important that as a museum you are transparent with regards to what you are doing in terms of advocacy and / or in terms of successes or mistakes you have made in conducting advocacy work (whether it be within the museum itself or with a collaborator).

Museums should make transparent the information they have, what they are doing with that information within the museum (whether it is through public actions or an internal exercise), as well as take a public stance on key and relevant issues to your community. The communications you put out are all part of clarifying your advocacy work externally. This helps to build trust and is a start on helping to invite communities into your organization (if done correctly with intention). Clarity can also come through the exhibitions and programming that your museum is doing. Promote advocacy throughout your museum activities and ask how you can embed what you learn and do with advocacy with your programming overall. [16]

Mistakes are bound to happen, particularly if you are not very experienced in advocacy work. It is daunting to approach advocacy when you do not have lots of experience with it but fearing mistakes will only hold your museum back when it comes to its advocacy efforts and the overall health of the organization. *LGBTQ2+ Inclusion in Canadian Museums* highlights the fact that making mistakes will occur and offers considerations for museums when they do fear making mistakes.[17]

When you start conducting advocacy work and are looking to share with your communities what it is you are doing, ask yourself the following:

a. Where can people access information about the advocacy work we are conducting? Is it accessible to everyone?

b. Are we hiding any information or mistakes made from the public for fear of making further mistakes or damaging our reputation? If we were in the shoes of the affected community, how would we feel about information that had been hidden?[18]

---

[16] Stephanie Anderson, "Unsettling National Narratives and Multiplying Voices: The Art Museum as Renewed Space for Social Advocacy and Decolonization — a Canadian Case Study," *Museum Management and Curatorship* 35, no. 5 (September 2, 2020): 488–531.
[17] Canadian Museums Association, "LGBTQ2+ Inclusion in Canadian Museums," 30, accessed September 18, 2022, https://museums.ca/uploaded/web/docs/Introduction_LGBTQ2.pdf.
[18] Canadian Museums Association, "LGBTQ2+ Inclusion in Canadian Museums," 30, accessed September 18, 2022.

c. What are we working on and how can we share information that supports our programming and/or exhibitions to enhance the public's understanding of our values?

d. Who can people ask for further information about our advocacy work internally? How can people reach out to get involved?

Advocacy Policy

What is an Advocacy Policy?

An Advocacy Policy is a policy, approved by the museum's Board of Directors in a motion, that outlines the causes, ideas, and issues that are important to the museum. More importantly, it delineates how the museum as a whole will react to moral or civic challenges that arise in your communities. The policy acts as a reference to ensure that roles within the museum's team are clearly defined when it comes to advocacy efforts.

The policy guides decision making on advocacy and activism initiatives and outlines the expectations for Board members and staff with regards to internal and external issues that require change from community or government.

A museum should approve two types of Advocacy Policies:
1) internal, advocating for the museum itself and its needs, and
2) external, addressing community issues and needs.

Once an Advocacy Policy is approved by the Board, the conversation becomes about implementation and action. Not everyone will have capacity to step actively into this work; further in this Guide are questions and considerations for how to determine capacity. However, the intention of this policy, as with all policies, is that once it is passed by the Board, it is the approved way of working for the organization.

Why does a museum need an Advocacy Policy?

Developing an Advocacy Policy will ensure that your museum Board, staff, and volunteers are all on the same page about how you conduct advocacy efforts internally and externally.

Advocacy policies should be built to suit the needs of your museum and the resources and priorities you have identified. Use the policy examples below as a template once you have gone through the Five Cs. It is important to have a clearly articulated way to approach advocacy. The action steps outlined below in the Advocacy Action Guide will help guide you in thinking about your policy before you draft it, and so it is recommended you read them through first. The Advocacy Action Guide below is also meant to serve as an outline for doing the work once a policy is in place.

Below there are two policy templates: one for advocating for change related directly to your museum, or the museum and heritage sector; and a second for advocating for change within community—for

specific issues identified by community and with which the museum is working in partnership to support positive change.

The recommendation of this Action Guide is that a museum have a policy for its own advocacy work, and that it then approves a policy for community-based work. Depending on the museum, these may be combined, or there may already be an internally focused Advocacy Policy approved and in place. The templates provided below are a starting point for a conversation and should be customized to your museum's policy format, Board direction, and community needs.

Internal Advocacy Policy Template

Policy Name:	**[Museum] Advocacy**
Date of Approval:	
Date of Review:	
Date of Approved Revision:	

The Canada Revenue Agency and other agencies at the federal, provincial, and municipal levels of government have adopted regulations and guidelines related to advocacy practices. The Board and staff will not engage in advocacy practices that are clearly partisan or deemed to be political in nature and in violation of law or regulatory requirements.

1. Advocacy activities of the museum shall address issues related to the strategic direction of the museum, the identified priorities and objectives of the museum, and the sustainability of the museum. Options for solutions will be developed that are consistent with the vision, mission, and policies of the museum. All advocacy activities shall be consistent with current municipal, provincial, and federal government legislation, Acts, and regulations.

2. The museum advocates by supporting new or revised policies and procedure to any order of government or organization that benefit heritage in [province / municipality].

3. Policy options that the museum presents are reflective of evidence-based knowledge and include practical recommendations. Issues addressed may be initiated by the museum or may be in response to external events.

4. Mutually respectful relationships are the foundation of interactions with elected officials, government departments, the media, other organizations, and stakeholders in the community.

5. Advocacy goals, actions, and recommendations will demonstrate a collaborative, cooperative, and solutions-based approach.

6. The museum will engage in effective communication to provide information about the issues affecting the museum through a variety of tactics to identified audiences specific to the Advocacy Plan.

7. Advocacy actions reflect important and relevant issues having impacts not only on museum members but also on significant numbers of stakeholders of the museum and are informed by program evaluation findings and research that are reflective of general trends and concerns.

8. The Executive Director and Board will work collaboratively on any defined advocacy initiative(s) and will provide information and facts on issues for presentation to the Board as a whole.

9. An Ad Hoc Advocacy Committee may be established, in alignment with the *Board Committee Principles and Structure Policy*, to address specific issues or to work on defined initiatives.

External Advocacy Policy Template

Policy Name:	**Community Advocacy**
Date of Approval:	
Date of Review:	
Date of Approved Revision:	

The Canada Revenue Agency and other agencies at the federal, provincial, and municipal levels of government have adopted regulations and guidelines related to advocacy practices. The Board and staff will not engage in advocacy practices that are clearly partisan or deemed to be political in nature and in violation of law or regulatory requirements.

1. Community advocacy activities of the museum shall work to address identified community issues, in collaboration and partnership with organizations that are working to address or solve the identified issue in the community.

2. In collaboration with the affected community, the museum advocates by supporting new or revised policies and procedure to any order of government or organization for the benefit of the identified issue(s).

3. Working with partners, collaborators, and supporters of the identified issues, policy options that the museum supports or presents are reflective of evidence-based knowledge and include practical recommendations.

4. Advocacy actions reflect important and relevant issues having impact on an identified community and are informed by research that is reflective of general trends and concerns.

5. Mutually respectful relationships are the foundation of interactions with elected officials, government departments, the media, other organizations, and stakeholders in the community. The museum works with its partners to support existing relationships and develop new relationships where required.

6. Advocacy strategy, actions, and recommendations demonstrate a collaborative, cooperative, and solutions-based approach.

7. The museum will engage in effective communications to provide information about the issues affecting the community through a variety of tactics to identified audiences specific to the Advocacy Plan and in collaboration with partners and collaborators. The museum will not act as

spokesperson on behalf of the community, nor communicate with identified elected officials, administrators, or media without the consent of the partner organization or community.

8. The Executive Director and Board will work collaboratively on any defined advocacy initiative(s) and will provide information and facts on issues for presentation to the Board as a whole.

9. An Ad Hoc [Community or Issue] Advocacy Committee may be established, in alignment with the *Board Committee Principles and Structure Policy*, to address specific issues or to work on defined initiatives.

Advocacy Action Guide

The following are guiding steps to help walk you through building your own Advocacy Plan or campaign. Each step outlines an action for developing an internal plan and an external one, although sometimes the two overlap. *Internal* refers to all advocacy activities that you do for your museum. *External* refers to any advocacy work that you do for your community or in collaboration with your community. Many times, these two can blend together, but at other times they are separate. The steps are divided into eight areas of focus to help break down parts of the policy that need attending to.

Advocacy Action Guide Steps Checklist

Issue Identification	
1. Understand the current context and environment.	☐
2. Identify the issue you are working to address.	☐
3. Research.	☐
Goal Setting	
4. Identify your goals.	☐
5. Identify your advocacy objectives.	☐
Community Connection	
6. Identify community members or groups who are being impacted by the issue or who have identified the need for change.	☐
7. Identify the elected officials and administrators you need to work with, and build your relationships with them.	☐
Resources	
8. Identify your organization's strengths and assets.	☐
9. Identify what resources you have available to offer.	☐
10. Identify opportunities that can support success, as well as challenges that could impede success.	☐
Tactics	
11. Consider who is responsible for what actions.	☐
12. Develop a workplan.	☐
13. Develop a timeline of activities.	☐
14. Develop a communications strategy.	☐
Reporting	
15. Measure success.	☐
Realign	
16. Adjust as necessary.	☐
Celebration	
17. Celebrate!	☐

Issue Identification

Step 1: Understand the current context and environment.
Continuously ask about and keep an eye on current events for changes to external movements and industry trends.

- Internal: What are other nearby / related museums doing when it comes to advocacy?
- External: What are the demographics of your immediate community and what has been going on in the external environment?

This step is all about making sense and being aware of the world around you, whether it be within your organization and the museum sector itself, or beyond that in social, political, or environmental contexts.

Step 2: Identify the issue you are working to address.

- Internal: What attitude, behaviour, policy, or process that impacts the museum are you wanting to change?
- External: What change in attitude, behaviour, policy, or process that impacts a community outside of the museum do you want to support?

Step 3: Research
Conduct research to understand the issue and the change that is being advocated for either internally or externally in community. Gather as much data and information to support the outcome you are working towards, and as you build your Advocacy Plan, determine the best way to use the research to support your goals and objectives.

The *Reconsidering Museums* Project engaged with over 500,000 people, and there is a great deal of detailed data to support museums advocating on their behalf. Below are a few samples of information included in the *Museums For Me: Engaging Canadians on the Future of Museums Report (What We Heard)*[19]:

- Survey respondents say museums play many roles in people's lives and in the life of their communities. Some almost universal roles are as a place to learn and be inspired (97%), a place to preserve and care for art and objects (95%), a place to help visitors and tourists explore a region or place (94%), and a place to help people understand other cultures and communities (93%) (11).
- Just over one-third (36%) of youth agreed that museums are most important in providing context for important contemporary cultural and social issues (13).

---

[19] Alberta Museums Association, "What We Heard Report," *Museums For Me: Engaging Canadians on the Future of Museums,*.

- Museums need to serve the community, be flexible in how they adapt to changing situations and requirements, and cater to the public by including digestible and relatable information for laypeople to understand and connect with in some way (14).

Goal Setting

Step 4: Identify your goals.
- Internal: What do you want to achieve as an organization with your advocacy work? How will advocacy advance your museum's vision, mission, and goals?
- External: What does your organization want to achieve with the advocacy project you are embarking on? Are our goals based on needs identified by the community?

Identify what you want to advocate for as a museum and tie that to your organization's strategic direction and identified community or internal needs.

Step 5: Identify your advocacy objectives.
- Internal: What do you want to achieve with your advocacy efforts within your organization?
- External: What do you want to achieve with your advocacy efforts in your community? What community issues are important to your organization?

Identify specific initiatives that need your advocacy attention. Examples could include: Indigenous relations, supporting a marginalized group in your community who is seeking policy changes, climate injustice, government funding, etc.

Community Connection

Step 6: Identify community members or groups who are being impacted by the issue or who have identified the need for change; then identify who you need to connect with and/or partner with to be successful.
- What is the issue you are dealing with and who is impacted by, involved with, a leader in, or pioneering this work already?

Identify any external stakeholders who have either been involved with the issue firsthand or through their own advocacy efforts. See where there is room for alignment.

Step 7: Identify the elected officials and administrators you need to work with and build your relationships with them.
- Who are your municipal government officials (mayor, etc.)?

- Who are your provincial government officials (MLAs or MPPs)?
- Who are your federal government officials (MPs)?
- Who are the Chief and Council of local bands?

Understand what level of government you need support from for your advocacy work. It is important to understand what you are doing and if it is a local, provincial, or federal change you are striving for.

Know who works in the administration offices of these officials. Build relationships with Chiefs of Staff, Office Administrators, and other bureaucrats and administrators who are actually tasked with implementing the work. These relationships are vitally important to moving an initiative forward.

Resources

Step 8: Identify your organization's strengths and assets (think about physical, digital, and human resources). Identify any gaps and where there are capacity issues.
- What has your museum historically done well? What do you need improvement on?

Your strengths and your areas needing improvement will help you understand what you are "good" at as an organization; this will help set any expectations within your team, partners, and stakeholders.

Capacity (Exploring the human capital needed for success)

This work can be intense and requires honest conversations about what is achievable when considering the current workloads of staff and Board. Ensure that the conversations include what can be taken off a staff member's plate in order for this work to take place. Be realistic about what can be accomplished in the timeframe you are working with: discuss priorities, possible reallocation of tasks, or—in some cases, not doing a project or stopping other work if the advocacy initiative is deemed the priority.

Explore what skills are currently available within staff, volunteers, and Board members. Does anyone have experience with successful advocacy campaigns? If not, who in the community has experience with advocacy and activism that you can learn from, or who you can bring to the table to guide your work? Consider the lived experience of the staff and Board – their perspectives may be highly relevant to advocacy projects. Ensure staff with lived experience engage within their own capacity and with the support and time necessary to navigate the personal and professional impacts of advocacy projects.

Consider establishing a working group or committee to distribute advocacy work in a more balanced way. Ensure you have the right skills, experience, and understanding of advocacy and activism at the table. Develop a clear Terms of Reference document to outline the scope of work, the responsibilities of

the group members, and the expectations of when tasks are to be completed. A template Terms of Reference is included in Appendix 4 of this Guide.

Step 9: Identify what resources you have available to offer (consider physical, digital, and human resources).
- Internal: What resources do you have internally to support your advocacy work? What are you missing?
- External: What partnerships already exist that you can leverage to support advocacy initiatives?

Consider the physical, digital, or human resource offerings that you have access to.

Budget
Consider the financial cost that your museum will incur with your advocacy work. Budget for honoraria for those you are asking to participate, consider protocols and purchase of items such as tobacco, and whether there will be food costs when you host gatherings. Also budget for travel for any museum staff, Board, and volunteers who may need to drive or fly to a provincial capital or to Ottawa.

Include an advocacy line item in your annual operating budget expenses. This allows for an annual discussion on what investment your organization is willing to make on specific initiatives. It also allows for tracking the percentage allocated to this work in relation to your overall budget. CRA has removed the quantitative limits on the resources a charitable organization or charitable foundation can devote to political activities, but continues to provide guidelines for public policy dialogue and development activities by charities. [20] Refer to the CRA website to confirm current legislation.

Time
Advocacy work is time-intensive. Capacity needs to be provided so that the work can be effective. This means scheduling meetings, but it may also mean travel, etc. Step 13 explores timelines in more detail but make no mistake: time is a resource required for success.

Step 10: Identify opportunities that can support success, as well as challenges that could impede success.

---

[20] Canada Revenue Agency, "2. What are the changes to the rules governing political activities of charities?" (as of 2022), https://www.canada.ca/en/revenue-agency/programs/about-canada-revenue-agency-cra/federal-government-budgets/budget-2018-equality-growth-strong-middle-class/public-policy-advocacy-activities-charities/qa.html.

- Internal: What will your museum be working on in the short and long term? Is there anything preventing your museum from conducting new initiatives? Where can your museum organization expand its capabilities? Are there pitfalls that may hinder your advocacy work?
- External: What is going on in the world around you? Are there other external factors (political, social, technological, legal) happening that would prevent advocacy work?

Think about where there is opportunity to grow as a museum, as well as any preventative measures.

Tactics

Step 11: Consider who on your team will be responsible for what actions or tactics.
- Internal: Who is your go-to person or team when it comes to advocacy initiatives? Do you need a new internal committee to decide on advocacy work? Who will be your spokesperson? Who will handle any immediate communications that need to go out in reaction to any social, political, or economic challenges?
- External: Who are your mentors or guides when it comes to advocacy? How do you work with them?

Step 12: Develop a workplan to determine how you will conduct your advocacy work.
- What are the specific steps and tasks needed to reach your goals and objectives?

Here you will want to treat an advocacy project like a program and develop a list of advocacy to-dos each time you start a new project or campaign. Advocacy takes work and should be monitored like any other internal (or external) project.

Step 13: Develop a timeline of activities that details how long your Advocacy Plan will take to execute.
- How long will you take to reach your goal and meet your agenda items?

> **Example timeframes to inform planning discussions:**
> Immediate: 0 to 3 months
> Short-term: 3 to 6 months
> Mid-term: 6 to 12 months
> Long-term: 12+ months

Note that oftentimes, advocacy takes lots of time and so planning your timeline of activities should be considered for the immediate, short-, mid-, and long-term. Consider work in three-month increments, and then evaluate to determine if additional time is needed. It is often the case that this type of work takes longer than you expect. Especially when working with government (both administration and elected officials), it can take a while to arrange meetings and then to follow up afterwards. Assess your timelines and tasks regularly to monitor effectiveness and success. Adjust were needed. There may be circumstances where immediate actions are required, where the museum needs to act quickly when a larger societal event occurs. Having a policy in place to guide decisions in these instances is critical.

For some museums, where relationships with the communities impacted by an immediate event are in the early days of being developed, the key is to reach out to determine how you can help rather than making assumptions. And if the community asks you not to be involved, listen.

Advocacy work is also often repetitive; you will need to repeat actions, such as following up with key decision makers to enforce change.

Step 14: Develop a communications strategy and plan that works in tandem with your overall goals and objectives, develop key messages, and decide what channels you will use to deliver the messages to the right audience.
- Internal: How will you speak to important stakeholders, as well as communicate the advocacy work that is happening internally to your team? Do all staff and Board members have the key messages in case they are approached by community members?
- External: What channels of communication will you use to convey your advocacy message to broader audiences (email, social media, etc.)?

You want to make sure that you incorporate your communications strategy into your overall timeline and treat it as an important part of your work; without communicating what you are doing, you cannot garner the support you need.

A Communications Strategy Template is included in the Appendices of the Guide to provide a starting point for what is needed to develop key message and to determine timing and appropriate channels.

Crisis Communications: Safety and Emergency Communications Management
- When faced with backlash or a controversial or contentious issue, having a clear communications plan in place is key. A template for developing a Communications Plan and a Crisis Communications Checklist are included in Appendix 5 of this Guide.

Reporting

Step 15: **Measure success.**
Identify metrics that support successful achievement of the objectives you outlined above. Sometimes these are called Key Performance Indicators (KPIs). These statements provide direction on what you are working to accomplish; they are specific, measurable, and achievable within the resources and time allotted. KPIs are linked directly to the original goals of the project and can range from achieving a specific dollar amount or percentage increase in funding, to meeting with local Members of Parliament two times within a calendar year to bring awareness to the value of your museum in their constituency

and how you can help impact positive community change on a particular social issue. Each campaign or initiative will need its own KPIs or metrics, the indicators of success that can be measured.

Track your results and progress, and share them openly with the public; connect reporting back to your original goals and how you identified success. Are any adjustments needed to continue on the path to success?

- Internal: How did you define success for your museum under the advocacy objectives? How did your work contribute to any success through this advocacy campaign? What still needs to be changed or adjusted?
- External: How did the community define success under the advocacy objectives? Together, have you achieved the outcomes sought?

Here you want to define some key indicators that will demonstrate that you have achieved success. It could be attached to numbers and statistics, but it could also be progress in how a community is now doing and feeling after your work is complete. Measure these indicators, record the information, and report on the successes at the end of the plan, and before your next iteration of the advocacy campaign.

Realign

Step 16: Adjust as necessary.
- Monitor the actions as you work to achieve your goals and objectives. Determine if any adjustments are necessary, or if the work is achieving the results anticipated.
- Do our goals and advocacy agenda still make sense? What needs to be changed?

Here you must understand that advocacy is a cyclical process and does not have a start and an end date. Once you clarify if your goals and advocacy objectives are still relevant, readjust them as needed and continue with your advocacy work.

Celebrate

Step 17: Celebrate!
As you achieve the objectives and goals you set out in your Advocacy Plan, celebrate both the small and big wins. Advocacy is not easy work, and it is important to mark the milestones and to enjoy the successes along the way.

Advocating to Government

Working with all orders of government is a significant part of advocacy, from working to change legislation or policy to increasing funding for programs. It is important to know which level of government you need to advocate to, as well as any rules and regulations that exist when it comes to government and advocacy. Each province has its own regulations around lobbying. Be aware of what regulates and guides advocacy and lobbying where you live.

There are specific regulations concerning lobbying, a specific type of advocacy work. Ensure you are following all legislation, regulations, and rules regarding lobbying in your municipality, in your province, and at the federal level. Know the legislation before taking any formal actions so that you understand your responsibilities and the expectations from a government perspective.

Be prepared.

Do your research.

Know your objectives.

Be clear with your ask.

As you build your Advocacy Plan, ensure you are advocating to the right order of government, and ensure that the language you use reflects the appropriate jurisdiction. Consider working with ministries that not only connect directly to the issue but could also be considered adjacent or connected in some way. For example, museums connect to not only heritage, arts, and culture, but also education, health, cities, Indigenous relations, economic development, tourism, environment, parks, recreation, and jobs, to name a few.

When you have identified the individual(s) that you will be advocating to, ensure that you have researched what they are working on, their past voting history on legislation, their policy interests, as well as the connection between the issue and their constituency. For example, know how the issue connects directly to those living in the riding of that Member of Parliament: are there statistics available to back up your request or information from the local museum to bolster your ask?

Be prepared. Do your research. Be clear in your objective: what are you asking of the individual or organization that you are advocating to for change?

If you are meeting with an elected official, you are often only allotted a short period of time for a meeting. Make sure you have done your research and are prepared with the specific ask for the individual. Know what you want to get across and be prepared to answer questions.

Outlined below is what each level of government is generally responsible for so that you can work to identify which level of government is necessary for your advocacy work.[21] [22]

Municipal Government: Parks, libraries, community water systems, local police, roadways, and more. Municipal governments are often led by a mayor and are typically responsible for immediate issues that come up in a community.

Band Councils: Govern First Nations communities and are responsible for any decisions that affect their respective community.

Provincial Government: Culture, tourism, education, healthcare, natural resources.

If you are meeting with a Minister, read their Mandate Letter; know what they have specifically been tasked with by the Premier.

Federal Government: Anything that may affect the constitution of Canada and/or the country as a whole, including but not limited to the Department of Canadian Heritage.

If you are meeting with a Minister, read their Mandate Letter; know what they have specifically been tasked with by the Prime Minister.

Arm's Length Agencies: Organizations that distribute funding on behalf of government, including arts councils and heritage authorities. Arm's Length Agencies exist at all levels of government, and each province and municipality manage these relationships differently. Understand whether they are directly linked to an order of government, or if they are truly independent and autonomous.

---

[21] Ontario Nonprofit Network, "Ontario Nonprofit Network," accessed September 18, 2022, https://theonn.ca/.
[22] Parliament of Canada, "The Three Levels of Government," Our Country, Our Parliament, accessed September 18, 2022, https://lop.parl.ca/About/Parliament/Education/ourcountryourparliament/html_booklet/three-levels-government-e.html.

Contact Information

For More Information:

If you have any questions on advocacy work in the museum sector, please contact info@reconsideringmuseums.ca.

Acknowledgements

Reconsidering Museums is a national project undertaken in partnership with a consortium of provincial and territorial museums associations and the Canadian Museums Association, led by the Alberta Museums Association.

We would like to thank all the individuals and institutions that supported the research and development of the Advocacy Policy Template and Action Guide through interviews, user testing, and reader reviews.

- Aanischaaukamikw Cree Cultural Institute
- Alexa Briggs, Calgary Chamber of Voluntary Organizations
- Chloe Dennis, Alberta Museums Association
- Bata Shoe Museum
- Diane Pellicone, Group of Ontario Emerging Museum Professionals
- Joan Kanigan, Western Development Museum
- Caroline Loewen, Alberta Museums Association
- Manitoba Children's Museum
- Emma Morris, Museums Association of Saskatchewan

- Montreal Museum of Fine Arts / Musée des beaux-arts de Montréal
- Robert Janes, Editor-in-Chief Emeritus at Journal of Museum Management and Curatorship
- Ryan Hunt, British Colombia Museums Association
- Shauna Lee Allen, PhD Candidate
- Stephanie Draker, WorkInCulture
- Tumbler Ridge Museum Foundation
- Johanne Vigneault, Community Museums Association of PEI

Appendix 1: Glossary

Below are key terms as well as additional terms that are referenced throughout the Advocacy Policy Template and Action Guide. Defining these terms provides clarity as some words and phrases exist in other contexts that are not related to the use of the term in the Guide. This glossary also serves to distinguish between and amongst terms that are oftentimes interchanged.

Activism: Marshalling and directing museum resources with explicit intent to act upon inequalities, injustices, and environmental crisis.[23]

Advocacy: Creating awareness around the importance of an immediate, national, or global cause, idea, and/or issue so that a future change in policy may be introduced, doing so through building positive relationships, promoting your organization, and sharing your needs. [24] [25] [26]

Advocacy Policy: Delineating what causes, ideas, and issues are important to your organization and how you will respond when confronted with moral and/or civic challenges. This is an internal-to-your-organization policy, approved by the museum's governing authority (e.g., Board of Directors).[27]

Allyship: Supporting and standing up for issues that a community is facing.

Capacity: A wide range of capabilities, knowledge, and skills needed in order to be vital and effective in staying true to the museum's mission; it may also include training, learning, and investing in staff, Board, or volunteers to ensure the appropriate capacity is in place to complete the work.

Community: A group of people connected through geography, shared interests, shared backgrounds, shared practice, etc.

Cultural Literacy: Having awareness about the importance of the cultural sector to develop a critical cultural perspective, particularly if you are part of a dominant culture, whereby you can see your own beliefs and practices in the context of many other cultures. Overall, being culturally literate means a person can successfully interact with people from diverse backgrounds, increase the value we place on culture, reduce prejudice and inequality, and increase participation in social practices.[28]

---

[23] Janes and Sandell, *Museum Activism*, xxvii.
[24] Americans for the Arts, "Americans for the Arts," accessed September 12, 2022, https://www.americansforthearts.org/.
[25] Ontario Library Association, "Updated November 2019 Advocacy Toolkit," prepared by Ontario Library Association's Advocacy Committee, November 2019, https://accessola.com/wp-content/uploads/2020/08/2019-11-Advocacy-Toolkit-2019.pdf.
[26] SaskCulture, "Advocacy & Changing Public Policy."
[27] Robert R. Janes, "The Elephant in the Room — Museums Won't Risk Doing Anything That Might Alienate Their Audience."
[28] Western Sydney University, "Why Is Cultural Literacy Important?," accessed September 18, 2022, https://www.westernsydney.edu.au/studysmart/home/cultural_literacy/why_is_cultural_literacy_important .

Grassroots (Movements): Self-organized, local-level efforts to encourage other members of the community to participate in activities in support of a given social, economic, and/or political cause.[29]

Impact: A positive transformation; awareness of the change; acknowledgement that change is taking place.

Intersectionality: First defined and used by Kimberlé Crenshaw as the "complex, cumulative way in which the effects of multiple forms of discrimination (such as racism, sexism, and classism) combine, overlap, or intersect, especially in the experiences of marginalized individuals or groups."[30]

Lobbying: The process through which individuals and groups articulate their interests to federal, provincial, or municipal governments to influence public policy or government decision making. It is an action of advocacy, and in many jurisdictions, is governed by legislation. [31] [32] [33]

Mission: Describes the current reality of an organization: why it exists, what business it is in, and whom it serves.

Movement: A group of people with a particular set of aims or ideas.[34]

Museum (ICOM Definition): "A museum is a not-for-profit, permanent institution in the service of society that researches, collects, conserves, interprets and exhibits tangible and intangible heritage. Open to the public, accessible and inclusive, museums foster diversity and sustainability. They operate and communicate ethically, professionally and with the participation of communities, offering varied experiences for education, enjoyment, reflection and knowledge sharing."[35]

Personal Agency: "The sense that I am the one who is causing or generating an action";[36] a person with a sense of personal agency perceives themself as the subject influencing their own actions and life circumstances.[37]

---

[29] Robert Longley, "What Is a Grassroots Movement? Definition and Examples," ThoughtCo, updated July 29, 2022, https://www.thoughtco.com/grassroots-movement-definition-and-examples-5085222.

[30] Canadian Museums Association, "LGBTQ2+ Inclusion in Canadian Museums," 19, accessed September 18, 2022.

[31] Americans for the Arts, "Education, Advocacy & Lobbying 501(c)(3) Rules of the Road," included in *Advocacy Toolkit: Organizations and Congress,* accessed September 18, 2022, https://www.americansforthearts.org/sites/default/files/pdf/2014/congress/C3vsC4_RulesoftheRoad.pdf.

[32] *Encyclopedia Britannica,* "Lobbying," accessed September 18, 2022, https://www.britannica.com/topic/lobbying.

[33] A. Paul Pross, "Lobbying in Canada," *The Canadian Encyclopedia*, last updated by Zach Parrott, January 13, 2021, https://www.thecanadianencyclopedia.ca/en/article/lobbying.

[34] *Cambridge Dictionary*, "Movement," accessed September 18, 2022, https://dictionary.cambridge.org/dictionary/english/movement.

[35] ICOM, "Museum Definition," August 24, 2022, https://icom.museum/en/resources/standards-guidelines/museum-definition/#:~:text=Following%20the%20adoption%2C%20the%20new,exhibits%20tangible%20and%20intangible%20heritage.

[36] Shaun Gallagher, "Philosophical Conceptions of the Self: Implications for Cognitive Science," *Trends in Cognitive Sciences* 4, no. 1 (2000): 15.

[37] Albert Bandura, "Toward a Psychology of Human Agency," *Perspectives on Psychological Science* 1, no. 2 (2006): 164–180,

Resiliency: The ability of an organization to anticipate, prepare for, respond to, and adapt to incremental change and sudden disruptions in order to survive and prosper.

Resources: Assets that an organization has to support its operation, which may include equipment, materials, space, time, or funding.

Stakeholders: Individuals or groups that influence decision making or who are impacted by a decision of the organization.

Sustainability: "Meeting the needs of the present without compromising the ability of future generations to meet their own needs."[38]

Vision: The desired future of the organization that inspires actions and engagement.

---

[38] United Nations, "Report of the World Commission on Environment and Development: Our Common Future," Oslo, Norway, 1987, https://sustainabledevelopment.un.org/content/documents/5987our-common-future.pdf.

Appendix 2: Email Template to Community Leader or Government

Emailing Community Leaders or Government Template

SUBJECT LINE: Meeting Request – MUSEUM NAME]

Dear [NAME OF LOCAL REPRESENTATIVE OR STAFF PERSON],

In my capacity as [ROLE] of the [MUSEUM], I would like to request a meeting to update you on the value that our museum provides in [COMMUNITY] and the work we are currently doing to support our community.

At [MUSEUM], our mission is to [INSERT MISSION HERE], and we are currently taking on an advocacy project about [INSERT INFO ABOUT ADVOCACY WORK HERE]. We are working with [INSERT ANY CURRENT PARTNERS ON THE WORK] to [INSERT YOUR GOAL HERE].

As [TITLE/ROLE] of [GOVERNMENT NAME OR ORGANIZATION NAME], I've seen firsthand how the museums sector in [COMMUNITY] contributes to our community. [PROVIDE ANY LOCAL EXAMPLES IF APPROPRIATE OR REMINDERS IF YOU HAVE WORKED WITH THE PERSON BEFORE ON PAST SUCCESSES].

This meeting is an opportunity to discuss the importance of [NAME ADVOCACY WORK] in [COMMUNITY]. I look forward to connecting with you further and am happy to answer any questions you may have. I can be reached at this email or by phone at [PHONE].

Thank you,
[NAME AND ROLE]

Appendix 3: Action Steps Checklist

Advocacy Action Guide Steps Checklist

Issue Identification	
1. Understand the current context and environment.	☐
2. Identify the issue you are working to address.	☐
3. Research.	☐
Goal Setting	
4. Identify your goals.	☐
5. Identify your advocacy objectives.	☐
Community Connection	
6. Identify community members or groups who are being impacted by the issue or who have identified the need for change.	☐
7. Identify the elected officials and administrators you need to work with and build your relationships with them.	☐
Resources	
8. Identify your organization's strengths and assets.	☐
9. Identify what resources you have available to offer.	☐
10. Identify opportunities that can support success, as well as challenges that could impede success.	☐
Tactics	
11. Consider who is responsible for what actions.	☐
12. Develop a workplan.	☐
13. Develop a timeline of activities.	☐
14. Develop a communications strategy.	☐
Reporting	
15. Measure success.	☐
Realign	
16. Adjust as necessary.	☐
Celebration	
17. Celebrate!	☐

Appendix 4: Committee Terms of Reference Template

[Museum]
Terms of Reference
Advocacy Committee

I. **Type of Committee:**
☐ Standing Committee
☐ Ad Hoc

II. **Committee Purpose**

III. **Membership of Committee**
Chair:
Members:

IV. **Objectives/Outcomes Working to Achieve**

V. **Resources Required**
(e.g., financial, other)

VI. **Meetings**
(e.g., frequency, timing)

VII. **Committee Authority**

VIII. **Reporting Relationship and Expectations:**
(e.g., written reports to monthly Board meetings)

Approved by Board of Directors
Date:

Appendix 5: Communications Strategy and Plan

Goals	• What do you want to achieve with your communications?
Audience	• Who are you delivering your messaging to?
Channels	• Where do these audiences access information?
Key Messages	• What does each audience need/want to know? • What do you need them to know? • What "call to action" are you asking for?
Assets	• What communication platforms and materials do you already have on hand? • What needs to be created? • Does the person responsible for delivering the messaging have access to logos, social media accounts, website, etc.?
Tactics	• What actions/steps need to happen to get the messages out?
Responsible	• Who on your team will be responsible for delivering the message?
Timeline	• When does the message need to be delivered by?
Evaluation	• Was the message received effectively? • Did the action you asked for take place?

Crisis Communications Checklist[39]

- ☐ Communications Plan
- ☐ Holding messages for serious emergencies
- ☐ Contact information for legal counsel or a public relations advisor
- ☐ Template media releases / backgrounders / leadership bios
- ☐ Style guides / branding files / logos/ templates / graphics / photographs
- ☐ Media Contact List
- ☐ Website (including log-in information if needed)

---

[39] Crystal Willie, ed., *HELP! An Emergency Preparedness Manual for Museums*, 2nd ed.(Edmonton, AB: Alberta Museums Association, 2017), 204.

- ☐ Social media accounts (including log-in information)
- ☐ Laptop with communications software, cell phone
- ☐ Digital camera or phone camera

Appendix 6: Internal Advocacy Policy Template

Policy Name:	[Museum] Advocacy
Date of Approval:	
Date of Review:	
Date of Approved Revision:	

The Canada Revenue Agency and other agencies at the federal, provincial, and municipal levels of government have adopted regulations and guidelines related to advocacy practices. The Board and staff will not engage in advocacy practices that are clearly partisan or deemed to be political in nature and in violation of law or regulatory requirements.

1. Advocacy activities of the museum shall address issues related to the strategic direction of the museum, the identified priorities and objectives of the museum, and the sustainability of the museum. Options for solutions will be developed that are consistent with the vision, mission, and policies of the museum. All advocacy activities shall be consistent with current municipal, provincial, and federal government legislation, Acts, and regulations.

2. The museum advocates by supporting new or revised policies and procedure to any order of government or organization that benefit heritage in [province / municipality].

3. Policy options that the museum presents are reflective of evidence-based knowledge and include practical recommendations. Issues addressed may be initiated by the museum or may be in response to external events.

4. Mutually respectful relationships are the foundation of interactions with elected officials, government departments, the media, other organizations, and stakeholders in the community.

5. Advocacy goals, actions, and recommendations will demonstrate a collaborative, cooperative, and solutions-based approach.

6. The museum will engage in effective communication to provide information about the issues affecting the museum through a variety of tactics to identified audiences specific to the Advocacy Plan.

7. Advocacy actions reflect important and relevant issues having impacts not only on museum members but also on significant numbers of stakeholders of the museum and are informed by program evaluation findings and research that are reflective of general trends and concerns.

8. The Executive Director and Board will work collaboratively on any defined advocacy initiative(s) and will provide information and facts on issues for presentation to the Board as a whole.

9. An Ad Hoc Advocacy Committee may be established, in alignment with the *Board Committee Principles and Structure Policy*, to address specific issues or to work on defined initiatives.

Appendix 7: External Advocacy Policy Template

Policy Name:	**Community Advocacy**
Date of Approval:	
Date of Review:	
Date of Approved Revision:	

The Canada Revenue Agency and other agencies at the federal, provincial, and municipal levels of government have adopted regulations and guidelines related to advocacy practices. The Board and staff will not engage in advocacy practices that are clearly partisan or deemed to be political in nature and in violation of law or regulatory requirements.

1. Community advocacy activities of the museum shall work to address identified community issues, in collaboration and partnership with organizations that are working to address or solve the identified issue in the community.

2. In collaboration with the affected community, the museum advocates by supporting new or revised policies and procedure to any order of government or organization for the benefit of the identified issue(s).

3. Working with partners, collaborators, and supporters of the identified issues, policy options that the museum supports or presents are reflective of evidence-based knowledge and include practical recommendations.

4. Advocacy actions reflect important and relevant issues having impact on an identified community and are informed by research that is reflective of general trends and concerns.

5. Mutually respectful relationships are the foundation of interactions with elected officials, government departments, the media, other organizations, and stakeholders in the community. The museum works with its partners to support existing relationships and develop new relationships where required.

6. Advocacy strategy, actions, and recommendations demonstrate a collaborative, cooperative, and solutions-based approach.

7. The museum will engage in effective communications to provide information about the issues affecting the community through a variety of tactics to identified audiences specific to the Advocacy Plan and in collaboration with partners and collaborators. The museum will not act as

spokesperson on behalf of the community, nor communicate with identified elected officials, administrators, or media without the consent of the partner organization or community.

8. The Executive Director and Board will work collaboratively on any defined advocacy initiative(s) and will provide information and facts on issues for presentation to the Board as a whole.

9. An Ad Hoc [Community or Issue] Advocacy Committee may be established, in alignment with the *Board Committee Principles and Structure Policy*, to address specific issues or to work on defined initiatives.