

## ADVOCACY FLOWCHART



### What's the impetus to communicate?

*Why choose advocacy?*

Things to consider:

- Would another method help us achieve the same goals?
- Is the impetus driven by internal or external factors?
- Is this about asking for something explicit or is it a more general approach?
- Short or long-term approach? We would always advise a long-term approach to relationships, in order to build support and minimise conflict.
- Does this help us to meet our plans/objectives?
- What's the end goal? How do you know you've reached it? What would success look like?
- Is the organisation fully committed to this?
- Are we being forward thinking and looking for opportunities or simply maintaining the status quo?

Common pitfalls:

- Not considering the impetus enough!
- Being too reactive: don't allow the environment or someone else's agenda to always lead you.
- Using advocacy as a cheap promotional tool: Advocacy should be about more than promotion and could command more time and resource than you first anticipate.

### Audit

*Getting your house in order and understanding the environment*

Any audit should be both internally and externally-focused: a SWOT analysis (internal) and/or PEST analysis (external) could be useful.

Things to consider:

- What are the organisation's vision/values? Are they shared?
- How do others value/perceive us? How does that need to change?
- Define what your museum's unique qualities or selling points are: prompt questions might include "what would the gap be if your museum no longer existed?" and "what do we do that has both significance and impact?"
- How can we communicate through both what we say and what we do?
- What resources are available/do we want to commit? Who will lead?
- What issues/policy agendas are on the horizon that could be relevant to our museum? Who's for and against?
- What might be our barriers?
- Do we need to reconsider the impetus (go back to step one)?

Common pitfalls:

- Being over ambitious: without good analysis the risk is that advocacy becomes overwhelming, difficult to manage and difficult to communicate. Match aspirations to resources.
- Lacking integrity: You will do yourself and your organisation no favours if you know in your heart that the thing you are communicating lacks credibility or integrity.
- Lacking external relevance

***At this stage you should be able to define what it is you will be communicating about***

*Common pitfalls:*

- *Lacking focus*
- *Vague objectives*

## **Targets**

*The who, why and 'who knows who'*

Considering existing networks and spheres of influence will be useful for identifying where there might be gaps.

Things to consider:

- Who can help us achieve our objectives? Why do we need them?
- Who are the decision-makers/key players?
- Who has a vested interest? Who else needs engaging or influencing? Map the potential impact and level of interest of all these people.
- What do these people value? What are their interests, concerns or agendas? Consider the professional, political and personal.
- How can you find out more about them and their interests?
- What are their levels of awareness and engagement?
- Consider their 'spheres of influence' – how else might you reach them? Who has their 'ear'?
- What other support can you marshal? Who could lend third-party credibility (especially those outside the museums sector)?
- Do we need other museums/partnerships to succeed?
- Who might we have missed?

Common pitfalls:

- A lack of information or understanding on targets and their interests: decision-makers are usually better informed about key processes.
- Target exhaustion: Organisations frequently call on the same people time and time again for support, often preaching to the converted.
- Never target the general public – there is nothing 'general' about the 'public', which is made up of a wide range of groups and individuals with varying interests.

***At this stage you should be able to define who you are targeting***

*Common pitfall:*

- *Scattergun approach: Be targeted and not all-encompassing.*

## Messages

*Building the argument  
and making the case*

Match messages to targets – it's that simple!

Targets are used to hearing from many parties, all making a case for their own interests. Keep messages positive and relevant. Advocacy should not be about crisis management.

Things to consider:

- If you're asking for something explicit does that need to inform the messages? Or is it about developing support that can be banked for the future? This should help define your message approach.
- Is there need for an overarching message or strap line that sums up your approach?
- How can you expand on the headline message? Define 3-5 key messages that are relevant to each target.
- Match messages to areas of mutual interest and reflect your understanding of the target and their interests.
- Consider whether to employ messages of the heart or head? How could you make the messages compelling?
- How will you substantiate your argument? Will you use qualitative or quantitative data/research? Ensure your evidence is robust.
- Consider where third party endorsements might add credibility to messages and back-up claims.
- What information can you draw on? Repurpose what already exists.
- Can you reinforce existing messages and make them meaningful?
- Ensure accuracy and make your argument robust. Keep your quality high.

Common pitfalls:

- Too many messages - don't lose sight of the aim. Too many messages can create confusion.
- Messages are too vague
- Messages are poorly substantiated: there is a lack of evidence or the evidence does not stand up to scrutiny.

***At this stage you should be able to define your messages***

*Common pitfall:*

- *Scattergun approach: Be targeted and not all-encompassing.*
- *Ensure your messages match your aim*

## Engagement

*Tactics for taking messages to your target*

The methods for getting to targets and the ways of engaging them are the things we tend to do first, without putting time into the previous four stages. Considering tactics can be an exciting and creative way to engage people with your organisation. It can be as much about bringing people in, as it is about going out to them.

Things to consider:

- Consider the methods for reaching your target. Think big and small. Have fun!
- Network, partner and befriend! Who could open doors and make introductions? How could you be more open and engaging? Is there strength in numbers?
- Do options include the opportunity for input and advice? How might you give your targets a sense of ownership or involvement? (E.g. establishing an advisory committee or seeking pro bono support)
- What indirect methods are there? (E.g. using the media, involving visitors)
- What would generate goodwill? (E.g. offering the venue for a meeting or event?)
- Are tactics appropriate and deliverable? Do the tactics match the organisation's aims, mission and values?
- What communication channels/networks are open to you? What others might you use?
- What do you already do that you could change or adapt?
- Who is the appropriate person to make contact? How will you stay abreast of activity, feedback and results?
- Consider timing, costs and other resource.
- Can the tactics/approaches be maintained in the long term?
- Share and celebrate successes – blow your trumpet and don't just rattle your tin. Be appreciative of those that help you.
- Be motivational and inspirational – don't be a burden.
- Don't overlook the personal touches, such as welcome letters or a 'thank you'.
- Consider what advocacy tactic is appropriate: are there governance or legislative restrictions to what you can do? Are there other conflicts of interest to be mindful of?

Common pitfalls:

- Avoid a 'rush to tactics': Don't put this step before others!
- A one-size-fits-all approach: just because it worked for others, doesn't mean it's right for you.
- Employing the same tactics time and again: keep it interesting.
- Inconsistent positioning.
- Duplication of efforts: ensure that lines of communication are clear and that targets are not bombarded by different people.
- Ignoring protocols: be mindful of the fact that an influential decision-maker may expect an audience with the museum's Director and not a less senior member of staff.
- Short-term flurries of activity: there is a risk people may feel used or 'dropped' if contact is not maintained.
- Lack of stamina or persistence.



***Now advocate!***