

Advocacy 101: Demystifying Advocacy

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Crossroads Carnegie Art Center Baker City, OR
Cultural Advocacy Coalition Board Member



What are we going to talk about today:

Who is the Cultural Advocacy Coalition and what we do to serve you?

- Overview
- Board of Directors
- Staff/ Lobbyist

•Critical things we do for our Members:

- Information
- Cultural Advocacy Day
- Capital Bonding
- Key Work on Arts Education, Wildfire Impacts on the Oregon Arts and Cultural Economies.

•2019 Successes

•What is Advocacy?

Cultural Advocacy Day!





Let's Get Started!



What is YOUR organization's and staff role in Local,
State and Federal Advocacy?

A Voice— Telling your Story and your mission!

Awareness- What is impacting your mission!

Funding Streams- Whose budget is being cut?
Whose is growing?

Your Sectors Story- Tell how you and your
partners are making our city, state and
country better.

What can you do? What can't you do?

You have to tell your story!



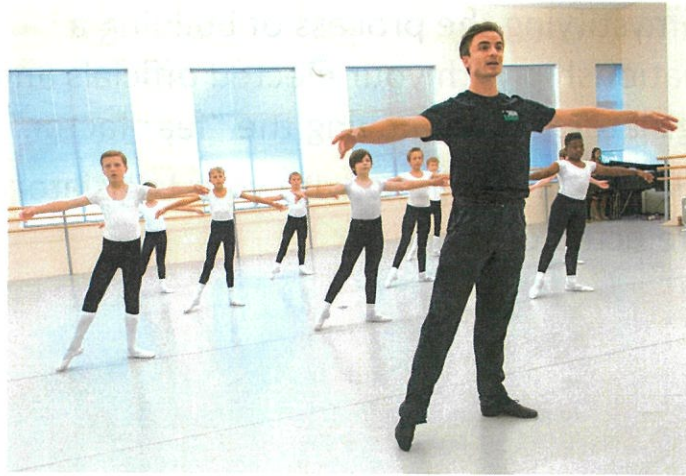
What do I say?

- Demystifying the process of building a relationship with your elected officials and legislators and removing the “fear factor.”
- Relationship building with your Legislator and all elected officials.

Capital Bonding

- What is Capital Bonding in Oregon for Arts and Culture and the CAC Role in the process?
- Discuss Museum success stories in the Capital Bonding process
- Steps forward in Capital Bonding for the Short 2020 Session and the long 2021 Session

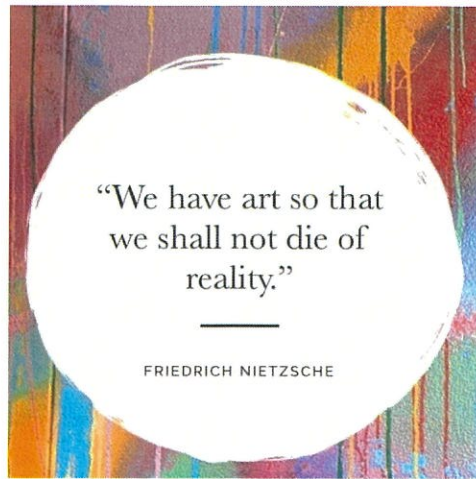
Strike when the Social Media Iron is Hot!



What are the 3 Tips?

- What are the three easy things you can do when you get home to start your advocacy work for your organization and be successful?
- Database Management- Information is King!
- Know the Gatekeepers!
- Relationships are everything– Build them before you need something!

Questions??



RULES REGARDING ADVOCACY BY MUSEUMS

There are several types of restrictions on advocacy by museums and other charitable organizations: *

Federal Tax Law Requirements:

Non-profit charitable organizations (with tax exemption under Section 501(c)(3) of the Internal Revenue Code ("IRC") are not permitted to engage in activities supporting or opposing any candidate for local, state or national office, but they are permitted to engage in issue advocacy ("lobbying") so long as the lobbying expenditures are not "substantial." Because that standard is subjective, the IRC allows an organization to choose an expenditure test comparing the organizations expenditures for tax exempt purposes to its lobbying expenditures:

If the amount of exempt purpose expenditures is:	Lobbying nontaxable amount is:
≤ \$500,000	20% of the exempt purpose expenditures
>\$500,00 but ≤ \$1,000,000	\$100,000 plus 15% of the excess of exempt purpose expenditures over \$500,000
> \$1,000,000 but ≤ \$1,500,000	\$175,000 plus 10% of the excess of exempt purpose expenditures over \$1,000,000
>\$1,500,000 but ≤ \$17,000,000	\$225,000 plus 5% of the exempt purpose expenditures over \$1,500,000
>\$17,000,000	\$1,000,000

Organizations electing to use the expenditure test must file Form 5768, Election/Revocation of Election by an Eligible IRC Section 501(c)(3) Organization to Make Expenditures to Influence Legislation, at any time during the tax year for which it is to be effective. The election remains in effect for succeeding years unless it is revoked by the organization.

*Museums that are owned and operated by city, county, state or special district governments should consult with their government legal counsel regarding restrictions and policies that apply.

State Law Requirements:

There are two types of state law restriction or requirements – lobbying registration requirement and gift limits:

Lobbying Registration: Oregon law defines lobbying as follows:

“Lobbying” means influencing, or attempting to influence, legislative action through oral or written communication with legislative officials, solicitation of executive officials or other persons to influence or attempt to influence legislative action or attempting to obtain the goodwill of legislative officials. ORS 171.725(8).

The law requires every person, regardless of whether they are paid to lobby or lobby as a volunteer, and regardless of whether the source of their salary is public money or private money, to register if they spend more than \$100 (time and materials, not including transportation costs) or 24 clock hours in lobbying activities in any calendar quarter. Volunteer (unpaid) lobbyists do not need to count their time spent testifying in committee hearings as part of that 24 clock hour limit.

Gift Limits: No person who has a matter of legislative or administrative interest to them or their employer before a public official (elected or appointed) may give anything of value to that public official worth more than \$50 per year. Food and refreshment are counted against this limit.

Grant and Contract Limitations:

If an organization or individual receives a grant or contract from any public or private organization, that agreement should be carefully reviewed to determine if there are any requirements or prohibitions on lobbying activity, above, beyond or different than the state and federal laws discussed above.

*Museums that are owned and operated by city, county, state or special district governments should consult with their government legal counsel regarding restrictions and policies that apply.



culturaladvocacycoalition

Cultural Resources Economic Fund

Endorsement Guidelines

Eligibility: Capital construction projects of \$500,000 or more, occurring between July 1, 2019-June 30, 2022

Deadline: Monday, July 2, 2018

Email: info@oregonculture.org

Contact: Christine Drazan, Executive Director, 503-680-6387 cell

Cultural Advocacy Coalition History, Vision and Mission

The Cultural Advocacy Coalition was formed in 1998 to advocate for policies and funding that will create a thriving environment for art, heritage, history and the humanities across Oregon.

The Coalition's vision is a state where Oregonians are able to access and engage in arts, heritage and the humanities in their community without barriers; where students have equitable access to quality arts education throughout their academic careers; and arts and culture organizations are able to provide innovative, world class programming that allows for the export of ideas, innovation and creative work, while contributing to Oregon's economy and quality of life.

The Coalition advances its mission and vision by lobbying the state legislature on behalf of the cultural community in support of its legislative agenda, including funding for capital projects. The Coalition endorses a package of capital construction requests from cultural nonprofits representing a diversity of regions and disciplines, prior to full legislative sessions, then works with endorsed organizations to seek legislative approval during the session.

Cultural Resources Economic Fund Purpose

In order to support economic growth within the cultural sector, new construction, building acquisition, historic preservation and reconstruction are regularly funded by the Oregon Legislature, through the Cultural Resources Economic Fund, which may allocate Lottery Bonds or General Funds to provide designated grants to capital projects in the cultural sector.

Endorsement Eligibility

Oregon-based 501c3 cultural nonprofits who are members in good standing of the Cultural Advocacy Coalition; with legal authority to improve subject property; with capital projects aligning with the purpose of the Cultural Resources Economic Fund; whose project clearly supports increased access to arts, heritage or the humanities; produces a quantifiable economic impact; is expected to be completed within the designated period; and is requesting 50% or less of construction costs for capital budgets exceeding \$500,000, are invited to seek the Coalition's endorsement of their project by submitting letters of interest by Monday, July 2, 2018.

Endorsement Process

Letter of Interest—establishing eligibility

Projects are invited to request the Coalition's endorsement of their project with a letter which addresses project eligibility for Coalition endorsement, including the following information:

- Overview of organization's leadership, mission, history and annual budget
- Verification of legal authority to improve property; description of existing building ownership or proposed ownership structure;
- Statement of need, with description of the problem
- Statement of the solution, with detailed description of the capital project;
- Description of how the capital project directly advances access to arts, heritage or the humanities;
- Estimate of the project's economic impact or description of process being undertaken to quantify economic impact
- Estimated construction budget and timeline; campaign fundraising to date
- Amount requested through Cultural Resources Economic Fund;
- Other state, local or federal funding secured or requested;
- Subject property's State Representative and State Senator
- Key contact information

LOI's are requested no later than Monday, July 2, 2018.

Panel Review—scoring eligible projects for Coalition endorsement

Organizations notified that they have met endorsement eligibility requirements will be asked to provide additional information for panel review, including but not limited to:

- Schematics of proposed project
- Detailed revenue and expense projections
- Estimated economic impact of project
- Legislative/elected official support
- Letter of support from potentially adversely impacted parties; or community outreach plan
- Business plan or sustainability plan
- Restoration or rehabilitation plan
- Risks or planning considerations which may materially impact timing, funding or completion.

Organizations are asked to provide this additional information no later than Monday, August 13, 2018.

Endorsed Projects—preparing for legislative advocacy

Following panel review, the Coalition will notify endorsed organizations no later than September 1, 2018. The Coalition will work with endorsed organizations to help them prepare for legislative review. The Coalition will formally request funding on behalf of the package of endorsed projects, coordinate lobbying efforts among organizations and manage the sector's Ways and Means request through the 2019 Session.

An endorsement by the Coalition does not guarantee approval of legislative funding.

Dear Advocates and Policymakers,

It is with deep gratitude that we celebrate the end of the legislative session as of yesterday. Thank you to the Cultural Advocacy Coalition's dedicated advocates, supporters and friends, who spoke out and encouraged investment in creative expression for all Oregonians.

THANK YOU to Oregon's policymakers, who took important steps to invest in our cultural sector. We look forward to the Governor signing *all* of the following bills passed by the Senate and House this week:

- Extend the Cultural Trust Tax Credit for 6 more years (HB 2164)
- Extend special tax assessments for historic preservation properties for 2 more years (HB 2164)
- Fund Capital Investment Projects (HB 5030 & HB 5050)- Total of \$5,125,000:
 - **Lincoln City Cultural Center** – \$1.5M for an exterior plaza
 - **Beaverton Arts Foundation** – \$1.5M for the Patricia Reser Center for the Arts
 - **Liberty Theatre**– \$1M for stage house and facilities improvements
 - **Oregon Nikkei Legacy Center** – \$500,000 for preservation and renovations
 - **Cottage Theatre** – \$375,000 for theatre expansion
 - **High Desert Museum** – \$250,000 for exhibit and gallery
- 2019-2021 Budgets for the Cultural Trust and the Oregon Arts Commission have been funded at the Governor's recommended levels (SB 5524)
- Renew the provision to spend cultural trust license plate monies on the marketing and promotion of the Trust (HB 2377)

Also in support of the cultural sector, the legislature provided funding for **Oregon Public Broadcasting**, and the **Oregon Historical Society**, long-standing members of the Cultural Advocacy Coalition.

Nearly all of our legislative priorities were adopted. We will be back in the 2020 session with a request to increase the amount of the Cultural Trust license plate by at least \$5 a plate. We will continue to work with the Governor and the boards of the Oregon Cultural Trust and the Oregon Arts Commission on two concerning issues: 1) Increasing administrative costs, and, 2) Decreasing contributions to the Trust.

With many thanks and forward momentum!

Thank you.

Dr. Nancy Golden
Board of Directors President
Cultural Advocacy Coalition



*P.S. If you haven't yet joined our Coalition, we'd love to have you. **Join us today by making a gift on our website.***

Board of Directors

Dr. Nancy Golden, President
University of Oregon, Eugene

Steve Bass, Vice President
Oregon Public Broadcasting; Portland

Dan Thorndike, Secretary
Medford Fabrication, Medford

Janet Plummer, Treasurer
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Ginny Lang
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Isaac Marquez
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Heritage Consulting; Portland

J.S. May
Artists Repertory Theatre; Portland

Cindy Price
Astoria City Council; Astoria

Jane Reid
Estacada Together

Danny Santos
Oregon Legislative Commission on Indian
Services; Salem

Ginger Savage
Crossroads Carnegie Art Center; Baker City

Kerry Tymchuk
Oregon Historical Society; Portland

Dana Whitelaw
High Desert Museum; Bend

**I would like to support arts and culture in
Oregon with a contribution to the
Cultural Advocacy Coalition.**

☐ \$50 ☐ \$100 ☐ \$250 ☐ \$500

☐ \$1,000 ☐ \$2,500 ☐ Other \$ _____

Make checks payable to the
Cultural Advocacy Coalition
PO Box 9160 Portland, OR 97207
or donate online at OregonCulture.org/join

Name _____
Address _____
City/State/Zip _____
Phone: _____
Email: _____

Thank you for your support!

The Cultural Advocacy Coalition is the only statewide advocacy organization
lobbying Salem on behalf of the arts, culture, heritage and the humanities.

The Cultural Advocacy Coalition is the only statewide advocacy organization lobbying Salem on behalf of art, culture, heritage and the humanities.

We operate solely through the support of **both individuals and organizations** who understand the importance of maintaining an advocacy presence in Salem. Please consider becoming a member today. **Every gift we receive, whether from you as an individual supporter or your organization makes an impact.**

As a unified, diverse, statewide coalition we can have incredible impact when we work together. Without your voice our coalition's story is incomplete. Join us!

Organizational memberships are structured in accordance with their annual budget size and based on the following scale. We welcome your support and will work with you to make arrangements as necessary.

Annual Membership Levels (for organizations):

- \$100 (Budget size \$0-\$99,999)
- \$250 (Budget size \$100,000 – \$499,999)
- \$500 (Budget size \$500,000 – \$999,999)
- \$1000 (Budget size \$1,000,000 – \$1,999,999)
- \$2,500 (Budget size \$2,000,000 – \$3,999,999)
- \$5,000 (Budget size \$4,000,000 – \$5,999,999)
- \$7,500 (Budget size \$6,000,000+)

Individual donations, either one-time donations or sustaining gifts can be made below as well. Thank you for supporting the Cultural Advocacy Coalition.

