Budget and Appropriations 101: Understanding the Process and Timelines

The American Association of Museums’ Online Advocacy Training Series, Part 2

Have no fear! We’ll explain muting, Q&A and other details when we start.
Topics

- About the Online Training Session
- Clarifying Terms (Appropriations versus Authorization)
- The NORMAL Process
- What’s Happening with Current Appropriations and Budget Items
- Advocacy Approaches for Each Stage
Who's Speaking?
About the Online Training Session

- What’s happening?
- Muting
- Q&A
- Recording and Follow-Up Materials
Welcome from American Association of Museums

Ford Bell: President, American Association of Museums
AAM Museum Essentials Webinar Series:
July-November, 2009

- Strategic Thinking and Planning (On-demand)
- Collections Conundrums (On-demand)
- Planning for Exemplary Visitor Experiences
- Audience Research and Evaluation
- HR Basics: Evaluating and Coaching Employees
- Project Management Basics

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Fear Itself
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Drinking It Up
Outreach at the Pub

Now What?
Life After Cuts
Getting Tweens in the Door
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# AAM Online Information Center

**HELP is JUST A CLICK AWAY!**

**AAM ONLINE INFORMATION CENTER**

Eight categories full of information to help you save time and solve problems available at [www.aam-us.org/infocenter](http://www.aam-us.org/infocenter)

- Collections Stewardship
- Facilities & Risk Management
- Financial Stability
- Governance & Support Organizations
- Human Resources
- Interpretation & Education
- Marketing & Public Relations
- Mission & Institutional Planning

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[www.aam-us.org/infocenter](http://www.aam-us.org/infocenter)
Clarifying Terms

- What’s the “budget”?
- What are “appropriations”?
- What are “authorizations”?
  - The law establishing the Institute of Museum and Library Services is an example of an authorizing law.
- Why does this matter?
The Normal Process: Key Steps for the US Budget Process

- President submits budget proposal (Usually early February)
- Congress reviews and develops its own version (the Budget Resolution) by April 15th
- The Budget Resolution, although not law and not signed by the President, provides two important sets of instructions
  - Reconciliation
  - Appropriations
- See the timeline
The Normal Process: Reconciliation

- So-called “Policy” or Authorizing Committees make changes to existing laws to ensure that they comply with the budget resolution.
- The laws that are being changed are authorizing laws.
The Normal Process: Appropriations

- Appropriations Committees and 12 subcommittees meet March through May to develop spending bills.
- Those bills are supposed to be sent to the floor by summer, passed by both houses, conferenced and then completed by the end of the fiscal year.
What Happens When Things go Haywire

- If the process is not completed by 9/30 (end of the fiscal year), there’s a Continuing Resolution (or “CR”)
- Current CR through October 31, 2009
- Any guesses on how many times Congress has met the deadline in the last decade?
It’s Confusing, but There’s Good News…

The AAM Government Relations team is ALWAYS Ready to Help! Current information and calls to action at: SpeakUpForMuseums.org
What’s Going on With Appropriations for FY2010?

- Congress passed a “CR” on September 30th because not all appropriations bills are finished (as we saw in the status chart earlier)
- AAM’s priority in appropriations continues to be IMLS Funding
- Also following NSF, NEA, NEH, NPS and Department of Education
- And, of course, ensuring that other bills do not restrict funding (Transportation bill examples here and here)
What’s Going on With the US Budget for FY2010?

- President submitted a budget in March, 2009
- Congress passed a budget resolution in April, 2009
- A Budget Reconciliation is pending
What’s Going on With the US Budget for FY2011?

- Federal agencies working right now on their budget submissions to the Office of Management and Budget
- President traditionally submits his proposed budget to Congress early February
- State of the Union address in late January signals his intentions
Why Does This Matter?: Advocacy Approaches

In the budget / appropriations process, you need to be clear on four things:

- Who’s in charge
- Who should ask
- When to ask
- How to ask (especially in tough economic times)
Who’s in Charge?

- Requests for increased funding for programs that support museums (i.e., the field-wide funding request)
  - For those with members NOT on appropriations: Ask them to send letters to appropriators (example: Tonko / Slaughter letter)
  - For those with members on appropriations: Ask them to support the funding request in committee and on the floor

- Use the SpeakUpForMuseums.org to find out if your members are on Appropriations

- Be sure to thank legislators who take these steps!
Who Should Ask?

- Politics is not a spectator sport!
- Grassroots advocacy (i.e., communications from citizens to their legislators) has the most impact of any form of communication!
- Think broadly about what “citizen communication” means
  - You
  - Museums Staff
  - Friends
  - Trustees
  - Supporters
  - Volunteers
When to Ask?

- Jan – March
  - Requests to individual offices
  - Start building the pressure for program funding
  - **Museums Advocacy Day**

- March – June
  - Focus on appropriators (or on asking individual members to reach out to appropriators)
When to Ask?

- **July**
  - Floor votes might start.
  - General outreach

- **August**
  - District visits!

- **September – December**
  - Floor votes and possible conference committee efforts
How to Ask (Especially in Tough Economic Times)

- Connect your message to two key themes
  - Jobs
  - Helping Struggling Families and Communities
- Personalize this with local stories and anecdotes
- Take a look at the American Association of Museums’ Economic Impact Statement Template
Woodson Art Museum
Wausau, Wisconsin

Economic Impact Statement

The Woodson Art Museum:

- Employs 31 people in our north central Wisconsin community (14 FTEs);
- Spends approximately $1,570,000 annually on goods and services in the Wausau area and throughout Wisconsin;
- Serves an estimated 56,000 visitors each year, including 33% from out of the local area; and
- Serves more than 11,000 schoolchildren each
Wrapping it Up: A Checklist for Budget Planning

- What do you want?
- Background research
  - How much funding does IMLS get now?
  - If you get an IMLS grant now, how much is it?
  - What has your museum spent IMLS grant funds on?
  - How much does IMLS need to serve the museum field?
- Who can you approach?
- How can you approach them?
  - Grassroots?
  - Direct Lobbying?
  - Don’t forget MUSEUMS ADVOCACY DAY!
- Where are you on the timeline?
- What are your other options?
The One Little Thing That Makes ALL the Difference

Persistence
How can YOU be more persistent?

- Attend our future online training sessions!
  - PART 3 - Building Relationships with Elected Officials: Strategies for Getting to Know Your Elected Officials
    When: Monday, November 9, 2009 1:00 PM - 2:00 PM EST
  - PART 4 - Making Your Case 101: What to Say, How to Say It, and Getting Your Staff and Visitors Involved in Your Museum’s Cause
    When: Tuesday, December 8, 2009 1:00 PM - 2:00 PM EST

- Register for Museums Advocacy Day 2010
- Use Speakupformuseums.org to send letters to your legislators
- Work with your AAM government relations team – they are here to help.
Final Questions or Comments?

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