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Preserving Oregon's Heritage: Connecting to Collections



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Issue**

Spring 2012
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Preserving Oregon's Heritage: Connecting To Collections



Introduction

Oregon Connecting To Collections (OR C2C), or the Oregon Preservation Assessment and Education Planning Project, is a collaborative effort among archives, libraries, and museums to create a statewide collections plan which would address institutional needs for training, consulting, mentoring, and networking in the areas of collections care and management, disaster preparedness, advocacy, strategic planning and priority setting, and technology for preservation. Connecting To Collections is a grant-funded initiative by the Institute of Museum and Library Services (IMLS) and in Oregon is administered by the Oregon Museum Association (OMA). Partners for the project include the Northwest Archivists, Oregon Heritage Commission, Oregon Historical Society, Oregon Library Association, Oregon State Archives, Oregon State Library, and Tamástslíkt Cultural Institute.

In dedicating this *OLA Quarterly* issue to OR C2C specifically and Oregon collaborative preservation efforts in general, I hope to bring attention to the great effort that has not only been going on since 2009 with the C2C planning grant but to the efforts that have been instrumental in leading up to the reception and implementation of the grant. Authors will address a past, present, and future perspective of the state of preservation in Oregon as well as the importance of the continuation of this work.

But first, in order to take a look at the effort in Oregon, one should step back and take a broader view of the state of heritage collections nationally. Shawna Gandy's article, "What's All this Fuss about Preservation: The Heritage Health Index & IMLS Connecting To Collections," addresses this national effort. In 1997, the President's Committee on the Arts and the Humanities was charged to report on the importance of cultural assets to society, and to assess private and federal support for creating and preserving these assets. The Committee returned with the affirmation, "that a healthy cultural life is vital to a democratic society." What came about from this report was a nation-wide survey of the state of cultural collections, known as the Heritage Health Index. Findings from this survey led the IMLS to create the Connecting To Collections initiative.

The preservation of library materials is one of our key professional duties. Although each library must assume some level of responsibility, associations can contribute to a wider effort by providing leadership in the establishment of sound preservation practices, advising and assisting libraries in developing solutions to preservation problems, and promoting education within the profession.

—CHARGE TO THE SPECIAL COMMITTEE ON PRESERVATION

In 1995, OLA established a Special Committee on Preservation to spearhead a statewide survey of Oregon libraries in order to assess the condition of its collective cultural collections and assess the level of preparedness each institution had in planning for and responding to disaster. The Summer 1997 *OLA Quarterly* issue covers the findings and work of this Special Committee and also speaks to disaster preparedness. Two key articles, Normandy Helmer's "The State of Oregon Preservation in 1995: A Survey by the Oregon Library Association's Special Committee on Preservation," and Lawrence Landis' "Disaster Preparedness: An Essential Function of Libraries and Archives," should not be overlooked in this discussion. This *Quarterly* issue is a vital read when considering past efforts in Oregon.

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OREGON LIBRARY ASSOCIATION

Kris Kern and Alex Toth continue this discussion in their perspective on preservation and disaster response preparedness in Oregon libraries, including a section briefly discussing the findings from the 1996 survey conducted by the Special Committee on Preservation. Kris and Alex also present the collective spirit of preservation efforts and the success and effectiveness of collaboration, focusing in on one such effort, the Disaster Recovery Group (DiRG) instituted by the Portland Area Library System (PORTALS). (This group is now the Oregon Library Association Library Preservation Round Table, aka, OLA LPRT).

The OLA LPRT has been an active and prominent voice in the OR C2C. With representation on the OR C2C Steering Committee, LPRT, along with the other C2C partners, took part in hiring a consultant, Ruth Metz, in managing the project. Ruth's piece, "What Oregon's Archival, Library, and Museum Personnel Need to Preserve Heritage Collections," explicitly details the grant project, its purpose, findings and outcomes.

In this OLAQ issue, we further highlight two key components of the project. Judith Norton writes about her experience traveling to the five regional forums held in Eugene, Portland, Medford, Bend, and Pendleton. OLA Past-President Rob Everett's letter touches on his participation in a Leader's Summit in Salem this past March and an important point he took away from it.

Now that everything for the OR C2C planning project has been finalized and reported to IMLS, the C2C Steering Committee is currently writing a proposal for the follow up IMLS C2C implementation grant. Kyle Jansson, coordinator of the planning grant with the Oregon Heritage Commission, presents key components of the implementation project, providing an in-depth look at the work being done now.

This has been a tremendous multidisciplinary effort, one that is appropriate and timely. More now than ever, institutions are looking to pull together resources and expertise, the Orbis Cascade Alliance being one example. The collaborative spirit is strong in Oregon and with the right direction I believe we can create a solid and useful model for preservation and disaster preparedness which will provide assistance to all cultural heritage institutions throughout the State.

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What's all this fuss about preservation?

The Heritage Health Index & IMLS Connecting to Collections

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Blame it on the culture wars. Yes, that's right, the clarion call to take stock of and address the preservation needs of heritage collections in the nation's libraries, museums, and archives came in the midst of controversy over federal funding for arts and culture. Harsh criticism of the National Endowment for the Arts and the National Endowment for the Humanities prompted President Bill Clinton to direct the President's Committee on the Arts and the Humanities to report on the importance of cultural assets to society, and to assess the complicated mix of private and federal support for creating and preserving these assets. In *Creative America: A Report to the President* (1997), the committee offered a passionate declaration: "We affirm that a healthy cultural life is vital to a democratic society. We believe that a great nation must invest in its cultural development and preservation, just as it supports scientific discovery and protects natural resources."

Among the mandates issued by the President's Committee, one is of utmost importance here: "Support a national assessment of the nation's preservation needs and a plan to protect our cultural legacy." The preservation community had, in fact, been discussing this need for some time and was poised to act. The national dialog about preservation assessment and planning dates back at least to the founding of the voluntary coordinating body, the National Conservation Advisory Council (NCAC), in 1973. NCAC's successor, the National Institute for the Conservation of Cultural Property (NIC), got the ball rolling by dedicating its entire 1997 annual meeting to formulating a response to the President's Committee's mandate on preservation.

NIC took on the challenge and with it the name Heritage Preservation. It formulated the first comprehensive nationwide survey of collecting institutions, the Heritage Health Index (HHI). The HHI targeted heritage collections held in the public trust by archives, libraries, historical societies, museums, archaeological repositories, and scientific research organizations. This survey provided the data necessary to quantify heritage assets, as well as gaps in collections care. The data can also help institutions to direct future planning and program development, spark creative cooperative efforts, and make the best of limited resources.

A partnership with the Institute for Museum and Library Services (IMLS), plus additional funding by the Getty Foundation and other private funding sources, made the survey possible. Advisors from thirty-five professional associations and federal agencies lent their expertise, and collecting institutions responded to the survey at an impressive rate.

The survey counted 4.8 billion artifacts held by 30,827 institutions. Sixty-three percent of these artifacts are in libraries, including:

- 96% of books and bound volumes
- 99% of microfilm and microfiche
- 89% of recorded sound items
- 88% of moving images
- 66% of digital material items
- 43% of archival records & manuscripts
- 50% of ephemera and other unbound sheets
- 29% of photographs



While these numbers are impressive, the survey also generated alarming statistics on collections care. Among libraries alone, 40 percent fail to regulate temperature and humidity



The survey counted 4.8 billion artifacts held by 30,827 institutions. Sixty-three percent of these artifacts are in libraries ... A hair-raising 78 percent of libraries do not have an emergency plan for collections that is backed by staff trained to carry it out, leaving billions of items vulnerable to damage or loss in a disaster.

to provide stable storage for collections, greatly reducing their life expectancy. A hair-raising 78 percent of libraries do not have an emergency plan for collections that is backed by staff trained to carry it out, leaving billions of items vulnerable to damage or loss in a disaster. Other threats include lack of staff dedicated to collections care, inadequate storage space, cataloging backlogs, and failure to assess collections conditions. Materials of the most fragile nature, such as photographic negatives, moving images, and digital files, are particularly at risk.

How could collections in this wealthy nation be in such dire straits? Another statistic provides some insight: 77 percent of collecting institutions have no funds specifically allocated for preservation. Without money for cost-effective preventative measures, such as environmental controls and appropriate storage, collections suffer in the same way that the health of Americans suffers from a lack of access to preventative medical care. Just as it is better to maintain healthy arteries than to try to repair clogged ones, so it is better to protect collections with proper handling and storage than to attempt to restore a damaged artifact.

Heritage Preservation concluded its report on the Heritage Health Index with the following recommendations:


- Institutions must give priority to providing safe conditions for the collections they hold in trust.
- Every collecting institution must develop an emergency plan to protect its collections and train staff to carry it out.
- Every institution must assign responsibility for caring for collections to members of its staff.
- Individuals at all levels of government and in the private sector must assume responsibility for providing the support that will allow these collections to survive.

To address these needs, the IMLS formed Connecting to Collections: A Call to Action, “a national initiative to raise public awareness of the importance of caring for our treasures, and to underscore the fact that these collections are essential to the American story.” Underpinned by a desire to build strong collaborative networks, the IMLS has held national and international summits as well as forums, workshops, and conversations. Grants and other programs support preservation activities. In Oregon, the IMLS has thus far distributed the Connecting to Collection Bookshelf of preservation resources to seventy-six institutions, awarded four Bank of America/IMLS American Heritage Preservation Grants, welcomed representatives of several institutions to forums and workshops, and awarded a Statewide Planning Grant to a coalition of libraries, archives, museums, public agencies, and professional organizations. We hope to continue to benefit from this initiative.

The IMLS also works with Heritage Preservation and the American Association for State and Local History to foster collaboration, encourage planning, advocate for collections, and generate support for preservation. The needs are great but funding is limited, so it is imperative to work collectively and fervently while the window of opportunity is wide open. The public needs to be included in the conversation, to appreciate the role collections play in our common heritage and to generate a sense of stewardship. After all, if we’re not saving this stuff for the public, what are we saving it for?



Both Heritage Preservation and Connecting to Collections continue to provide leadership in preservation and are great resources for Oregon's collections stewards. Explore their Web sites to find out more and sign up for the new Connecting to Collections online community to stay up-to-date and connected. But first, read more about what's happening on the statewide level in this issue of the *OLA Quarterly*.

And the culture wars? They're still raging. To arms! 

Further Reading

Heritage Preservation. *A Public Trust At Risk: The Heritage Health Index Report on the State of America's Collections*, 2005. <http://www.heritagepreservation.org/HHI/>

Institute for Museum and Library Services. *Connecting to Collections: A Report to the Nation*, 2010. <http://www.ims.gov/assets/1/AssetManager/CtoCReport.pdf>

President's Committee on the Arts and the Humanities. *Creative America: A Report to the President*, 1997. <http://www.eric.ed.gov/PDFS/ED413276.pdf>

Important Links

Heritage Preservation:

<http://heritagepreservation.org/>

IMLS Connecting to Collections Web site:

<http://www.ims.gov/collections/>

Connecting to Collections Online Community:

<http://www.connectingtocollections.org/>

Connecting to Collection Bookshelf

<http://www.ims.gov/collections/bookshelf.aspx>



A Perspective on Preservation and Disaster Response Preparedness in Oregon Libraries

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Oregon libraries share a unifying interest in the preservation of their collections. This interest is based on a common desire to be good stewards of the developing collections with which they have been entrusted. Preservation in this sense can encompass as many different strategies as there are libraries and range from formulating comprehensive disaster response plans to ongoing efforts to insure access to print and electronic resources.

The litany of natural disasters that have affected Oregon over the years is extensive and we are quite sure that everyone can recall several such events. Given the geographical diversity of our state, some of these events have directly affected our library structures and collections to greater (or lesser) extents. The potential distress of a disaster can, and often does, serve as a powerful motivator to action. However, it seems contrary to human nature to dwell for an extended period on calamities that can befall oneself, one's library, or one's collection. Because of this, imperatives to action can easily be displaced by the press of everyday activities, with the result that preservation and disaster preparedness often default to the bromide, "I'll get to it someday ...". One method that has proven to be effective as a way of following through on preservation and disaster preparedness activities is collective action by the formation of a group of individuals that have the responsibility for or a desire to preserve library materials in any number of circumstances. Such an approach serves the purpose of keeping and making the most of the collective energy of the group and the naturally collegial and collaborative orientation of libraries. Such an approach also serves as a subtle ongoing reminder to all involved of the consequences of a failure to follow through on preservation and disaster response preparedness activities.

In this article, we will examine one collaborative Oregon preservation effort that we believe is both enlightening and instructive for the example that it provides and for the direction that similar efforts may take in the future. The initiative that we have chosen to examine is that of the Disaster Recovery Group (DiRG) established by the Portland Area Library System (PORTALS). PORTALS was a library consortium founded in 1993 to meet the research and educational needs of libraries in the greater Portland area through cooperative and creative access to information resources and services. What made the consortium somewhat unique was its composition. Private and public universities, community colleges, public libraries, and an historical society in the states of Oregon and Washington were sustaining members of PORTALS. In the summer of 2000, The PORTALS Library Council, the consortium's governing body which consisted of the directors of member libraries and a historical society, sought out possible cooperative activities to undertake. Among those put forward was that of disaster response training. Recognizing that disasters could affect any and all participating institutions and that preparation to mitigate such events was in the interests of all members, the Council agreed that some form of disaster response planning and management would be mutually beneficial for PORTALS members.

Previous to this development were a number of efforts that focused attention on and created an interest in disaster response preparation and the preservation of library materials. Notable among these was a 1995 survey of preservation efforts in Oregon libraries. The survey was conducted by the OLA Special Committee on Preservation and published on behalf of the Committee by Normandy Helmer, Preservation and Binding Department Head at the University of Oregon Library in the Summer, 1997 issue of the *OLA Quarterly*. The article was titled, "The State of Oregon Preservation in 1995."



The survey was divided into four parts, with one section devoted to “interest in preservation development.” The article noted that “Oregon does not have a history of successful preservation networking and has had no experience in cooperative preservation efforts,” however, “In Oregon, library consortia such as PORTALS and Orbis have the potential for fostering cooperative preservation.” With regard to OLA’s role, the Committee on Preservation suggested “... the creation of a round table to facilitate the coordinated effort to develop statewide preservation activity, and the advocacy of OLA among state stakeholders, such as the Heritage Commission and members of the library consortia Orbis and PORTALS.”

The same issue of the *Quarterly* also featured an article by Lawrence Landis, Acting Archivist, Oregon State University, titled “Disaster Preparedness,” in which he noted that, “Disaster preparedness is an essential part of the operation of a library or archives ...”

Another development which contributed to enhancing an awareness of the need for preservation activities and disaster preparedness in Oregon libraries was a 1998 meeting facilitated by the Regional Alliance for Preservation that sought to address the lack of preservation infrastructure and services in the Pacific Northwest. In that same year the Orbis Preservation Taskforce organized a meeting at Reed College, in Portland, to discuss local preservation needs, issues and ideas. In 1999, Orbis established a standing Preservation Committee which organized a Pacific Northwest preservation stakeholders meeting, held in Seattle, titled “Swimming Upstream.”

The synergy created by the previously mentioned preservation activities led the PORTALS Executive Director to convene an August, 2000, meeting of an ad hoc preservation group of representatives from several PORTALS institutions. First on the agenda for the August meeting was a discussion of what disaster response planning encompassed. It was agreed that preservation needed to be part of comprehensive disaster response planning and that preservation efforts needed to be systematic and ongoing within institutions. At a subsequent meeting, the ad hoc group chose the name Disaster Response Group (DiRG) as its name and invited all PORTALS institutions to participate in its meetings.

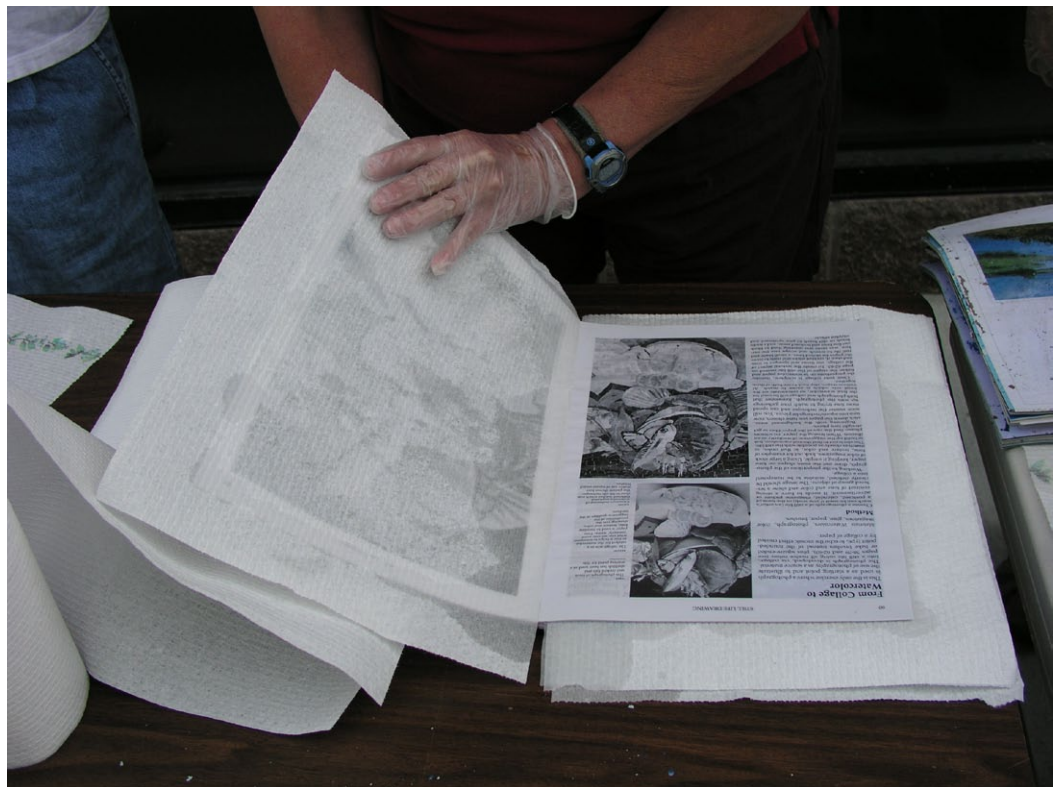
Over the course of several meetings, DiRG developed a disaster response plan template with a general outline that could be customized for each participating library. The template would include common background information, local and regional preservation experts and facilities resources available for libraries, and a list of emergency response supplies. Much of the background information utilized to establish DiRG was adapted from similar California efforts: the San Diego/Imperial County Libraries Disaster Response Network (SILDRN) and the Inland Empire Libraries Disaster Response Network (IELDRN). DiRG recognized training as a critical need in order to provide disaster preparedness knowledge for PORTALS members and initiate library disaster response planning. They proposed a two-day workshop focusing on both institutional and inter-institutional disaster response planning. In addition, they determined to establish a mutual aid agreement, following IELDRN’s model. This would require the commitment of each Council member to provide for a corps of trained workers, available on a volunteer basis to assist another library in the event of a disaster.

To accomplish these goals, the members of DiRG drafted a mutual aid agreement and brought it to the PORTALS Library Council for its review and approval. The Council members not only approved the draft for implementation, but agreed to place the mutual aid requirement in the PORTALS bylaws, rather than include it as an addendum. The



bylaws stated that each PORTALS member will “maintain a current disaster preparedness plan and participate in mutual recovery aid when needed.” The Council also accepted the proposal that DiRG facilitate emergency response preparation, promote emergency response awareness, and coordinate emergency response training for member libraries.

The Council funded a disaster response training in late fall, 2000, at which AMIGOS Library Services presented a two-day workshop that covered the basics of disaster preparedness and recovery. The first day’s session was held at Portland Community College’s Sylvania campus and focused on the following: what constitutes a disaster, disaster prevention, setting priorities, and creating a disaster plan. On the second day, in an empty industrial building which is now Linfield College’s Jereld R. Nicholson Library, attendees participated in hands-on training recovering water damaged material from a simulated disaster. The experience of salvaging various media drenched in water enlightened participants to the real challenges involved in responding to a library emergency. A follow-up training for disaster management took place in the spring of 2001. Julie A. Page, then the Preservation Librarian at the University of California, San Diego, organized and facilitated a session entitled, “Exercising Your Disaster Plans,” that provided an overview of disaster planning and described a disaster response exercise, implemented on her campus.



Learning the ropes in damage repair.



To facilitate the development of disaster recovery plans for individual institutional members, minutes from DiRG meetings, a template disaster response plan, and disaster recovery information links were placed on the PORTALS Web site. One of the aims of DiRG's emergency preparedness effort was to develop a list of local resources that could be called upon for assistance in the event of an emergency. In the fall of 2001, an important step toward this goal occurred when a letter of understanding between PORTALS and a local cold storage company was drafted for the purpose of providing for interim storage space for water damaged materials.

Additional disaster response and preservation trainings were organized by DiRG under the auspices of PORTALS and made available to the Library community. These included:

Assessing Vulnerability and Identifying Risks, presented in October 2004 by Julie Page and Michael Smith of the Conservation Center for Art and Historic Artifacts at the Multnomah County Library, and


Emergency Preparedness Response and Recovery and Care and Handling of Collection Materials, presented in December of 2004 by Shelby Sanett of the AMIGOS library consortium.

While PORTALS membership was composed of a variety of institutions, it drew largely on the libraries of public and private universities. The need for such a formal organization diminished with the ongoing development of the Orbis consortium for academic libraries which had originated in 1997 with the development of a shared union catalog. Orbis joined with Washington academic libraries in the Cascade Alliance in 2002 to form the Orbis-Cascade Alliance. PORTALS was dissolved as an organization in 2007. Even though the PORTALS formal organization ceased, two of its important aspects continued, one of which was DiRG. The members of DiRG continued to meet informally and continued to promote disaster response and recovery planning and preservation activities. During this period several DiRG members were selected to attend the year-long Pacific Northwest Preservation Management Institute at the University of Washington. A DiRG member became a Western States and Territories Preservation Assistance Service (WESTPAS) trainer and another DiRG participant was successful in obtaining grant funds to organize and offer a Portland area workshop for first responders to disasters related to libraries and cultural heritage institutions.

DiRG continued as an informal interest group until 2008 when, on behalf of its members, DiRG co-chairs Kris Kern from Portland State University Library and Alex Toth from Pacific University Library successfully petitioned the Oregon Library Association for the creation of a Library Preservation Round Table. The Round Table identified its charge in part as facilitating communication among OLA members from all types of libraries, regarding the importance of the preservation of library materials, and increasing general awareness of preservation activities in libraries. The Library Preservation Round Table's ongoing involvement in the issue of disaster response and preservation has taken several forms. In 2008, a May Day Disaster Response Workshop was organized by Shawna Gandy of the Oregon Historical Society. That same year, the Round Table edited the Winter issue of *OLA Quarterly*, focusing on disaster preparedness in Oregon libraries. In both 2009 and 2010 the Round Table participated in poster sessions held in conjunction with the Oregon Library Association's Annual Meeting.



One of the most significant contributions the Preservation Round Table has made is its position as a contributing member on the Steering Committee of the Connecting to Collections grant from the Institute for Museum and Library Services and administered by the Oregon Museums Association. The grant provided for a preservation needs survey among Oregon's libraries and cultural heritage institutions. This was in part a follow-up to the national Heritage Health Survey and sought to identify the needs and ways of addressing them.

In many ways, the DiRG and Preservation Roundtable "grass roots" efforts are typical of those in the Oregon library community. A need or opportunity is identified, and people are brought together by their mutual interests. As demonstrated in the case of DiRG and the LPRT, results take time to develop, and the process is ongoing. This development over time allows an opportunity for greater participation and a more solidified grounding for the preservation and disaster planning initiatives. In the case of DiRG, by working collaboratively with institutional support from libraries and consortia, as well as personal commitment, opportunities for improving the state of disaster readiness and preservation activities in Oregon libraries were enhanced. There is an expectation that, under the auspices of the Library Preservation Round Table, such efforts will continue well into the future. 

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OLA Quarterly 14, no. 4, 2008.



What Oregon's Archival, Library, and Museum Personnel Need to Preserve Heritage Collections

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Introduction

An Oregon preservation needs assessment was undertaken in 2010 for the project, *Oregon Connecting To Collections* (C2C). It was commissioned as a follow-up to the national Heritage Health Index (HHI) to further identify needs of Oregon's archives, libraries, and museums in preserving Oregon's cultural heritage collections. The grant's purpose was directed primarily at understanding the training needs of personnel caring for Oregon's heritage collections.

The needs assessment process entailed five regional forums, a statewide survey, and the analysis of data and findings by a multidisciplinary Steering Committee. The full needs assessment report is posted at: www.oregon.gov/OPRD/HCD/OHC/docs/c2c_final.pdf

The Needs Assessment Process and Participation

The needs assessment consisted of five regional meetings followed by a statewide survey of individuals involved in preservation. The forums provided anecdotal data from 88 participants in five locations: Eugene, Portland, Medford, Bend, and Pendleton. Following the regional meetings, the C2C Steering Committee administered a statewide survey to verify and quantify the anecdotal findings of the regional meetings. The survey included a taxonomy of needs constructed from the regional meetings, the intent being to validate, quantify, and elaborate the anecdotal findings from the regional meetings.

The *Oregon Preservation Survey* was available online from October 24, 2010 through November 30, 2010 and received 200 responses. The respondents were from individuals working in all types and sizes of collecting entities across Oregon. The largest number of responses was from persons associated with museums of some type, followed by libraries, archives, and finally, agency or institutional research or repository collections. Respondents were from institutions located in all geographic regions of Oregon. All but one county was represented. Nearly 35 percent of respondents were from institutions located in rural areas; that is, associated with collecting institutions located 50 miles or more from a population center of 20,000. Over a quarter of respondents were from organizations that have no paid staff.

Funding for Preservation

When asked about their needs, the regional forum participants often said "money" and for good reason. Archives, libraries, and museums are generally not specifically budgeting for preservation, according to the survey. This is the case across types and sizes of entities. Only 24 percent of survey respondents indicated that their institutions budgeted funds specifically for preservation. The rest either have no funding for preservation or funding is drawn from other broader purposes. Across survey respondents, the mean preservation spending for 2010 was expected to be \$2,000. The expected 2010 spending for preservation as a percentage of the institutional budget was 1.76 percent.

Training Needs

The survey clarified and prioritized preservation needs so that Oregon can focus on a future plan that will improve preservation of Oregon's heritage collections. Funding, advocacy, technology, planning, information, and networking were major themes. In particular, the needs assessment identified 47 specific learning needs in six categories. These categories and the associated learning needs are:



Disaster Preparedness

Eighty-five percent of survey respondents indicated that their institutions do not have a disaster preparedness plan that is current and ready to be activated. Forty-five percent have no disaster plan while about 40 percent are in the process of planning that is either unfinished or stalled.

Collection Care

The media in most urgent need of care are photographic materials, historical objects, moving images, textiles, recorded sound, unbound sheets, and digital materials. Oregon preservationists want to learn best practises for:

- Storing and handling by collection format
- Choosing archival enclosures and boxes
- Choosing storage furniture
- Understanding environmental conditions and how to monitor them
- Providing security for collections
- Drafting and implementing a disaster response plan and team
- Understanding and practicing collections salvage procedures
- Understanding and choosing reformatting options (microfilm, digital, etc.)
- Understanding and choosing book binding options
- Deacidification
- Conducting a collections condition assessment
- Choosing a conservator
- Conducting a survey of facilities and collections for preservation needs
- Setting preservation priorities
- Drafting a preservation plan

Collection Management

Judging from the needs assessment, over half of Oregon’s collecting institutions have no paid staff expressly for preservation. Many of Oregon’s collecting institutions are staffed completely by volunteers. The needs assessment found a broad-based need for basic collection management training in the following:

- Saying “no” to items that are not appropriate for our collection
- Organizing collections
- Planning for and prioritizing collections
- Writing a collection development plan
- Learning strategies for managing the backlog
- Understanding acquisitions and documentation procedures
- Being able to catalog the collection
- Knowing about cataloging options and trends and being able to apply them to my situation
- Understanding and using metadata



Planning for Preservation

The need for strategic planning and priority-setting was strongly validated by the survey respondents. Preservationists feel there is strong need at the institutional level for strategic planning, and they want to develop these planning skills:

- Planning and setting priorities with board and administration
- Analyzing our organization for greater effectiveness
- Thinking and planning strategically
- Developing long-range preservation plans and setting priorities
- Planning for Disaster response and recovery
- Planning fund development
- Planning, prioritizing, implementing, and following through on a group work plan

Preservation Advocacy

Oregon preservationists want to develop these advocacy skills, in particular:

- Be better able to make the case for preservation with our boards, parent institutions, and donors
- Be better able to recruit, retain, and train volunteers
- Acquire skills to promote the collection
- Be better able to develop a workforce of staff or volunteers for the future
- Be better able to engage the public in financially supporting our preservation agenda
- Be better able to reach out to and engage youth
- Be better able to write winning grants and proposals

Respondents included “other” advocacy needs, such as working with the legislature, regional and local governments, organizations, and local businesses to secure funding.

Practical Technology for Preservation

Computer capability varies greatly across Oregon, both for individuals and their institutions. Some have very little technology, basic training, or knowledge of applicable technology. Others have equipment and the knowledge and skill to use technology in preservation. The needs assessment identified that these skills are needed by about 50 percent of survey respondents. The need for the following skills is even greater for those working in all-volunteer organizations:

- Be able to use a computer
- Be able to trouble-shoot computer hardware and do basic maintenance and repair
- Be able to apply technology efficiently
- Understand how to install and use Wi-Fi
- Be able to evaluate software products
- Understand applicable Web trends
- Be able to use social networking technology
- Keep up with technology changes
- Be able to resolve reformatting issues

In addition to the foregoing learning skills, preservationists say that information and networking will help them improve their effectiveness in preserving Oregon’s heritage collections, individually and collectively.



Information

Oregon preservationists think that “centralizing” a body of information about preservation would be particularly useful in addressing their learning needs. Respondents want samples, tools, and lists that they can access on-line, especially samples of specific documents, training resources, tools for evaluating the effectiveness of one’s promotional strategies, and a resource list for locating expertise and consultants for preservation. These specific ideas were suggested and found broad support in the needs assessment process:

- An overview of museum services and operations
- A description of desirable knowledge, skills, and abilities that volunteers and interns should have for one’s institution size
- Online sample policies from large, medium, and small institutions
- On-line training resources
- Tips for insuring collections
- Tips for finding processing supplies
- Tips for coping with audiovisual and IT operating systems format changes
- Tips for automating one’s collection holdings
- Tips for how to preserve collection records
- Recommended database software for creating and accessing the collection inventory
- Resource list to locate expertise and consultation for preservation
- Sample plan of action to promote the collection
- Tips for working with the press
- Tools to evaluate the effectiveness of one’s promotional strategies
- Success stories

Networking

Statewide and regional networking for preservation of Oregon’s heritage collections is greatly desired. Ideas for networking that have broad-based support are:

- Create a Web portal that facilitates communication amongst archives, museums, and libraries that have a preservation agenda
- Create a Web-based portal that brings together regional and statewide training and best practices tools and resources for preservation
- Establish an online network of heritage institutions and organizations
- Offer regionally-based formal training
- Organize regionally-based informal networking
- Co-fund consulting for the region
- Share administrative staff regionally
- Develop collaborative grant projects
- Develop mutual agreements in case of disasters

For planning purposes, the networking ideas that were top-ranked and should be addressed first are:

- Create a Web-based portal that brings together regional and statewide training and best practices and resources for preservation
- Establish an online network of heritage institutions and organizations
- Offer regionally-based formal training



- Create a Web portal that has a preservation agenda and that facilitates communication amongst archives, museums, and libraries

The needs assessment clarified the several forms of “training” that learners want to have available to them. A great deal of learning can be self-directed, aided by information on a single Web site. In their learning, preservationists want to avail themselves of:

- One-to-one or group mentoring, particularly with someone in geographic proximity
- Consultation, in person or by telephone and e-mail
- Formal training, whether in person or on-line

In Conclusion

Following the needs assessment, leaders from Oregon’s archival, library, and museum organizations and agencies assembled to consider the findings of the needs assessment and to develop next steps. A list of these individuals and the institutions they represent are included in the needs assessment report.

These leaders acknowledged that any plan to address the preservation needs of Oregon’s archives, libraries, and museums should also provide information, training, consulting, mentoring, and networking in six categories:

- Collection Care
- Strategic Planning and Priority Setting
- Collection Management
- Disaster preparedness
- Preservation Advocacy
- Practical Technology for Preservation

The C2C Steering Committee asked the Oregon Heritage Commission to appoint a cross-disciplinary (Archives, Libraries, Museums) preservation advisory body. The purpose of the advisory body would be to collaboratively plan and strategize on funding initiatives for preserving Oregon’s heritage collections. The suggested initial planning agenda for the recommended advisory board was to:

- Develop a plan for requesting grants and other funds to implement the committee’s recommendations.
- Conduct a statewide Inventory of critical objects and collections to ensure they are given attention.
- Submit an IMLS Implementation grant (\$50–250K) to carry the preservation agenda forward.



On the Road with OR C2C

by **Judith Norton**
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University

“It is ... the duty of every good citizen to use all the opportunities which occur to him ... or her, for preserving documents relating to the history of our country.”

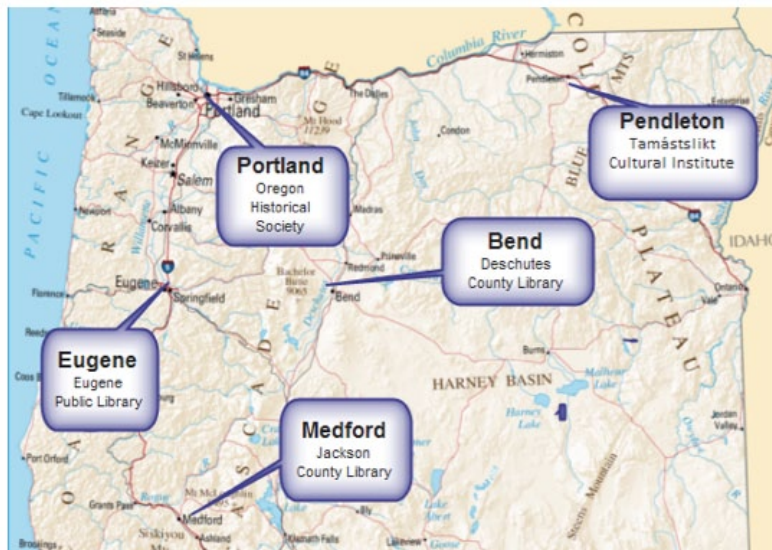
—Thomas Jefferson

In 2009, the Institute of Museum and Library Services awarded Oregon a Connecting to Collections Planning Grant (also known as OR C2C). Under the umbrella of the Oregon Museums Association, seven other institutions came together to plan for preserving Oregon’s cultural heritage. This collaborative initiative was the necessary first step in securing funding for future implementation. (See Kyle Janson’s article in this issue for more about the IMLS Connecting to Collections Statewide Implementation Grant.)

The grant steering committee named our project the “The Oregon Preservation Assessment and Education Planning Project,” and submitted this description to IMLS:

The Oregon Museums Association will partner with seven organizations to identify the preservation needs of the state’s libraries, museums, and archives. After conducting a survey, evaluating the information, and staging regional forums, leaders of the state’s cultural organizations will collaboratively create a statewide preservation plan addressing the recommendations of the Heritage Health Index. This plan will address the need for more workers trained in collections care and emergency preparedness, outline steps to improve the quality of collections care throughout the state, and raise awareness of and generate support for the preservation needs of the state’s cultural collections among the public and decision makers.

OR C2C Forum Locations



Once the grant was awarded, we decided to launch the planning process by holding forums in Eugene, Portland, Medford, Bend and Pendleton in order to solicit input about preservation needs and practices. Feedback gathered from the forums would be used inform



the subsequent survey. The grant’s consultant, Ruth Metz, facilitated the forums with assistance from the steering committee (look for her article on the final assessment in this issue). Members of the steering committee developed eight broad questions for the forum:

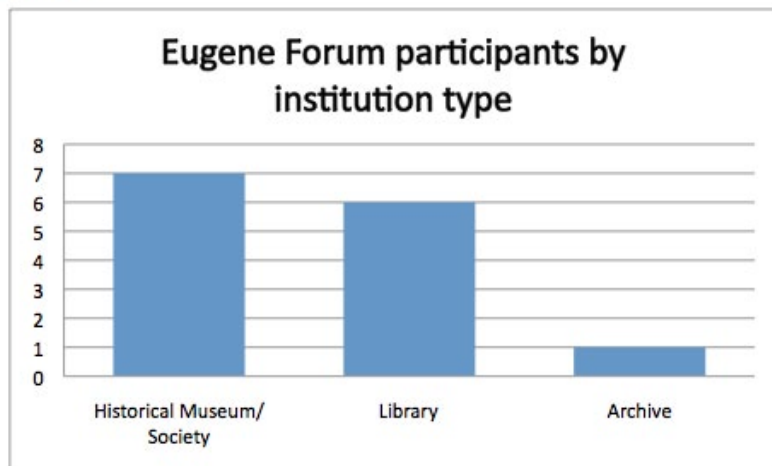
- What do you think puts your heritage collections at risk?
- What do you think will remedy those risks?
- What training do you and people in your institutions need to help preserve and promote its collections?
- How do you get these needs met now?
- What form must the training take in order to be of benefit to those who work in your institution?
- In what “state” is your institution’s disaster preparedness?
- We are going to be conducting a statewide survey of Oregon’s heritage collection in the fall. What do you think are the most important questions to ask?
- What else needs to be said?

With questions identified, presentations ready, posters and easels in hand, and our experienced consultant as our guide, we were ready to embark on the OR C2C Road Trip!

**Day 1
July 15, 2010: Eugene**

Our first forum was held at the downtown branch of the Eugene Public Library. The lovely art and inspirational quotes scattered throughout the library created a special place to gather and discuss how we could ensure these - as well as other - treasures would be preserved for future generations. The participants represented a balanced mix among historical societies, museums and libraries, and ranged from the Confederated Tribes of Grand Ronde to the Willamette Heritage Center to the University of Oregon’s Special Collections and Archives. Their input set the foundation for subsequent forums. Participants identified collections care, assessment, disaster response, and training as their primary concerns.

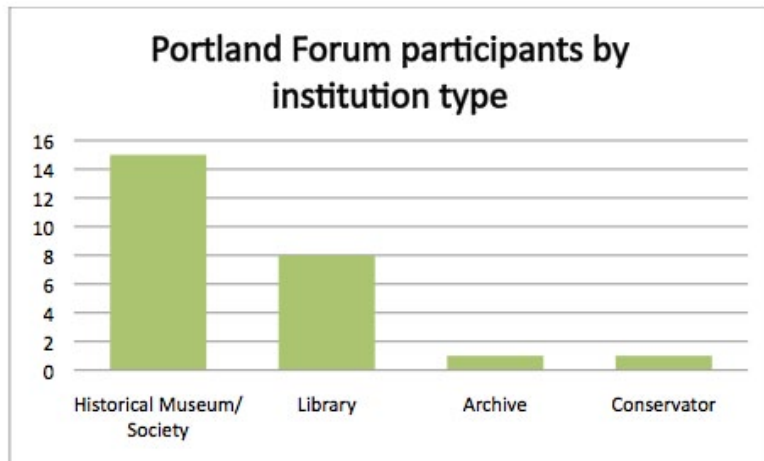
Graph 1



Day 2
July 16, 2010: Portland

The Oregon Historical Society opened one of their elegant meeting rooms for the second forum. Compared to Eugene, attendance represented a much higher percentage of historic societies and museums, along with more paid professional staff. The forum discussion reflected this. Participants had the highest interest in strategic planning, grant writing and volunteer and donor relations, although the major concerns identified at the Eugene forum were also raised. It was exciting to see such an interesting variety of museums represented, including the Oregon Jewish Museum, the Architectural Heritage Center, the Oregon Nikkei Legacy Center and numerous local historical societies. Libraries had a robust presence as well, including Tigard Public Library, George Fox University, Concordia University, and Portland State University.

Graph 2

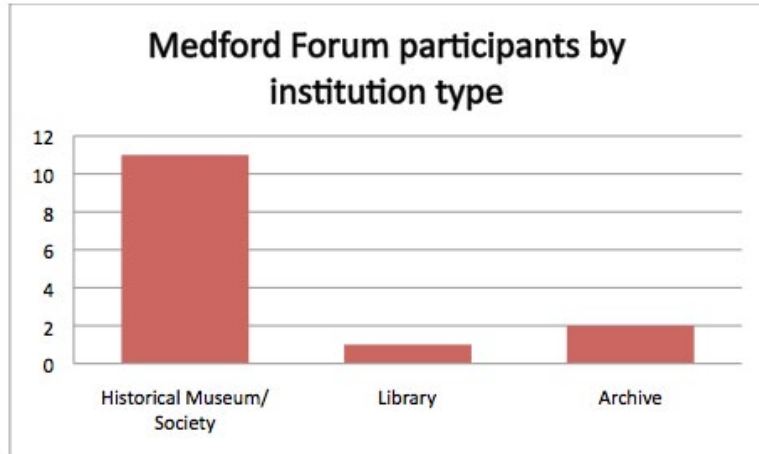


Day 3
September 13, 2010: Medford

On an exquisitely sunny late summer day, thirteen dedicated staff and volunteers met in the beautiful Medford Public Library to share their challenges concerning their collections. The participants at this forum were the most diverse among Oregon historical societies and museums compared with the other forums. Imagine this variety in one room: the Oregon Shakespeare Festival; the Collier Memorial State Park Logging Museum; the Crater Rock Museum; the Southern Oregon Historical Society; and the Coos Historical and Maritime Museum! This is just a representational snapshot of the attendees. With such a mix, it follows that their concerns ranged from conducting a basic inventory to more complex conservation of rare materials and objects.



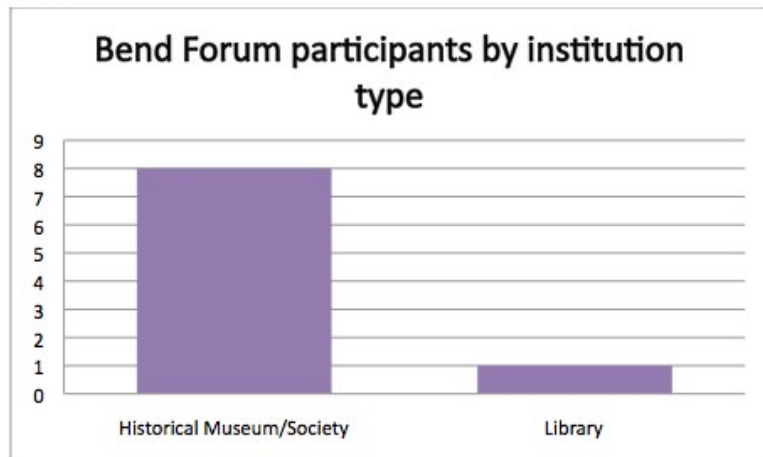
Graph 3



**Day 4
September 14, 2010: Bend**

With the smallest number of participants, the Bend forum was the most intimate. The Deschutes Public Library provided a small, sunny room in their administration building, enhancing the cozy feeling of the forum. This informality allowed participants to move beyond just sharing their challenges and start discussing how they could develop their own support network in their region. Some of the institutions represented included the Museum at Warm Springs, the Crook County Historical Society, the High Desert Museum and the Jefferson County Library.

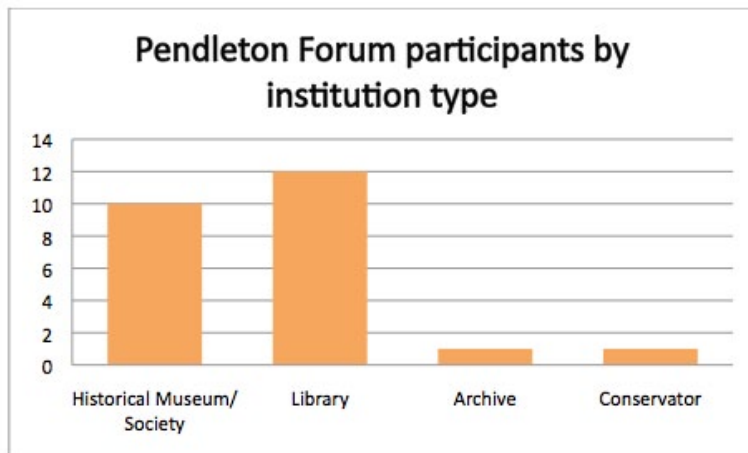
Graph 4



**Day 5
September 28, 2010: Pendleton**

Our sunny weather held on for a stunning visit to the Tamástslíkt Cultural Institute, overlooking the high plains of the Columbia Plateau. The large group included representatives from Blue Mountain Community College, the Round-up and Happy Canyon Hall of Fame, Arlington Public Library, and the Union County Historical Society. Attendance was fairly split between historical societies and museums and libraries. Given the rural nature of this forum, many of the organizations are small and depend on volunteer staff. Funding and training for basic information technologies is a major challenge. Some still rely on dial-up access, and many participants indicated that on-site training and consultations would help bridge this “digital divide.”

Graph 5



Home Again, Home Again

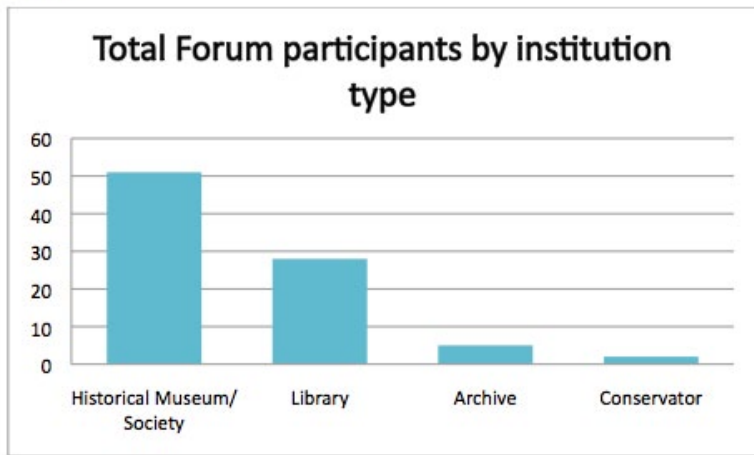
All together, fifty-two historical societies and museums, twenty-nine libraries, five archives and two private conservators (for a total of eighty-eight participants) gave their time and expertise to help identify priorities for their collections. Primary threads from the forums were: training in collection care, collection management, disaster response, and support for planning and advocacy. Most participants also shared that, due to time and funding, they often face many challenges when it comes to taking advantage of training opportunities. While online training was attractive to most, many would also like on-site consultations.

What I found so inspiring was hearing staff from a diverse variety of organizations discussing their mutual challenges. While needs differed depending on location, financial resources, and staffing levels, many common threads were identified. These collective concerns were incorporated into the state-wide survey sent out to all of Oregon’s cultural heritage institutions in October 2010.



It also became clear that the OR C2C initiative provided benefits that went beyond a needs assessment. It has provided an opportunity for diverse types of organizations to break down traditional silos, come together, and support each other in the critical mission we all share in common: ensuring that our rich cultural heritage is passed on to our next generations. There is much work to be done, but we are on the way! 🌿

Graph 6



A Daunting but Inspiring Event:

A Letter from Rob Everett

by Rob Everett

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Director,

Springfield Public Library

November 18, 2011

To members of OLA:

The Oregon Library Association, through the OLA Library Preservation Round Table, was asked to be one of several partners in the Connecting to Collections: Statewide Planning Grant, administered by the Oregon Museums Association. It was my privilege to be one of OLA's representatives at an all-day leadership summit, held at the State Library in Salem on March 7, 2011. This meeting was attended by representatives of Oregon's cultural heritage community, ranging from small, local history museums to large university archives, and from Oregon's community libraries to the Oregon Heritage Commission. This meeting brought together, for the first time, the many disparate agencies, commissions, and post-secondary institutions that in some way, shape, or form have an investment in, and a responsibility for, preserving Oregon's cultural heritage.

It was by turns a sobering, reaffirming, and ultimately inspiring day. It was sobering to hear the state of our museums, special collections, and archives. And it was daunting to hear that so few resources, both financial and human, are being dedicated to this important and time-sensitive work. Not only do we need to step up to meet the challenge of un-managed and/or deteriorating collections and artifacts, but we need to do so immediately.

It was reaffirming because, through the Connecting to Collections initiative, so many of us, large and small, expert and amateur, were brought together to learn of the plight of Oregon's cultural heritage, forming a network that can work to accomplish for the entire citizenry of the state something that no one entity could accomplish on its own.

And finally, it was inspiring to experience the shared sense of commitment that we all came away with that day. I know that the Oregon Library Association is rededicated to supporting this initiative and helping realize a statewide accessible, cultural heritage resource, both physical and virtual, that will enrich our citizen's lives for decades to come.

As an Oregon librarian and a 5th generation Oregonian, I'm proud to play a small part in this endeavor, for myself, for my children, and for my grandchildren.

Respectfully yours,

Rob Everett, Past-President
Oregon Library Association



Making Dreams Come True

by **Kyle Jansson**
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Coordinator,
Oregon Heritage Commission

Imagine that you have designated adequate funds in your budget for preserving your library's heritage collections. In addition, you have had adequate training to manage those collections, and you have a plan in place to deal with them during disasters. Moreover, if some collections management issue comes up and you need technical help, assistance is a phone call away or a skilled mentor is less than two hours away ready to visit or talk on the phone.

Sounds pretty good, doesn't it?

Those are many of the dreams that members of the Connecting to Collections (C2C) committee have been working to realize by developing an implementation grant proposal to the Institute of Museum and Library Services. That proposal, which is due early next year, has been the focus of the committee's effort since last summer.

The committee had concluded after its surveying was completed a year ago that a plan to address the preservation needs of Oregon's libraries, archives and museums needed to focus on a structure and funding for providing information, training, consulting, mentoring, and networking. Specifically, six categories needed attention: collection care, strategic planning and priority setting, collection management, disaster preparedness, preservation advocacy, and practical technology for preservation.

A second item to be considered in the planning was how to have a delivery system that supported libraries, archives, and museums around the state, a special challenge for Oregon, which is ranked 39th from the top in population density.

A third issue was finding an organization that would take the lead implementing the plan. This issue was solved when leaders of statewide collecting organizations, including the Oregon Library Association and the Oregon State Library, requested at a March summit that the Oregon Heritage Commission take the lead. The Heritage Commission accepted the request at its July 17 meeting. The Commission also agreed to appoint a Collections Preservation Cabinet, which will regularly meet and advise the Commission on collections preservation initiatives.

Creating the Implementation Grant

Meanwhile, the coordinating group for the initial C2C planning grant continued to move forward and began planning how to implement their recommendations. Committee members had already concluded that the initial items to be considered on that agenda would be: developing a plan for requesting grants and other funds to implement their recommendations, conducting a statewide inventory of critical objects and collections to ensure they are given attention, and submitting an IMLS implementation grant of up to \$250,000 to carry the preservation agenda forward.

Because of the immediacy of the IMLS grant deadline, the coordinating group formed a couple of subcommittees to try to identify the four most interesting opportunities:

1. **A "Cool Stuff" Campaign.** Organizations would self-identify two or three objects, collections or documents. Then, perhaps, communities could decide the most significant among those, construct displays highlighting them, and have them included in a statewide competition.



2. **Disaster Planning and Response.** Organizations would partner to present a variety of training opportunities in disaster planning and response. Besides the trainings, this possible project would include developing and promoting a Virtual Resources Web portal, an emergency hotline, and a regional response network.
3. **An Oregon Collections Preservation virtual resource.** Drawing upon the expertise of the Heritage Commission's Collections Preservation Cabinet, information would be selected and compiled for quality and relevance to the needs of Oregon's libraries, archives, and museums. It would be actively maintained by a paid professional with preservation expertise.
4. **A Training the Trainers Program.** This would include a Preservation Academy to train a Mentor Corps involving people from all parts of the state. Key curriculum areas would deal with document preservation, object preservation, digital preservation, human relations (personal and political), and finding resources (financial and other.)

Kyle Jansson, the coordinator of the Oregon Heritage Commission and the project director of the Oregon C2C group, then attended a national C2C Conversation Exchange at the American Association for State and Local History's national conference. He heard presentations about projects in more than a dozen states and met with IMLS leaders of the C2C project.

Jansson reported back to the Oregon C2C group regarding some developments affecting their proposals:

1. Heritage Preservation, with funding from IMLS, has created a C2C Online Community at www.connectingtocollections.org. The Community's goals are to help smaller libraries, museums, archives and historical societies locate reliable preservation resources, and to engage with each other and top professionals in the field. It includes free Webinars, a discussion forum, highlighted resources, a calendar and an archive.
2. At least one other state has used the "Cool Stuff" idea, with much of their grant money going to develop an online contest, as well as materials and training for museums on how to market the educational and cultural value of their collections and the objects in them.
3. In geographically large states, regional networks seem to be most effective. Libraries, museums and archives seem most willing to participate with other organizations within a couple of hours drive, especially when it can help connect them with other local organizations such as disaster response units.

The IMLS is looking closely now at the potential sustainability of C2C projects when reviewing grant proposals.



The Oregon C2C group has since narrowed the focus of its proposal to the Mentor Corps, creating an Oregon portal to collections and disaster preparedness resources, and disaster planning grants. These will be further modified during grant planning prior to the Feb. 1 application deadline.


Moving Into the Future

The Oregon C2C group won't hear from the IMLS regarding grant awards until September. However, statewide efforts to improve collections preservation planning will continue. Heritage Commission chair Jan Mitchell has contacted statewide organizations for recommendations of people to serve on the Collections Preservation Cabinet. The Cabinet will be made up of representatives of professional organizations such as the Oregon Museums Association, the Oregon Library Association, the Northwest Archivists Inc., and agencies such as the Oregon State Archives, the Oregon State Library, the Oregon Historical Society, the State Historic Records Advisory Board, and so forth.

The initial planning agenda for the Collections Preservation Cabinet, which will include members of the C2C group, is:

- Develop a plan for requesting grants and other funds to implement the committee's recommendations.
- Conduct a statewide inventory of critical objects and collections to ensure they are given attention.
- Advise the Commission on other collections preservation initiatives.

The Cabinet will be meeting 2–4 times a year. Oregon has received few statewide collections grants during the past decade and the Cabinet has the potential for initiating projects and receiving more grant public and private funds. This could be particularly valuable as libraries and other collecting institutions strive to be more efficient in their work, to make sure their staffs have adequate training, and to be prepared for a variety of potential disasters.

For more information about the Cabinet or the C2C effort, contact Kyle Jansson at kyle.jansson@state.or.us or 503-986-0673. 



OLA Quarterly Publication Schedule 2012

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Each issue is developed around a theme determined by the Communications Committee and Guest Editor(s). To suggest future topics for the *OLA Quarterly*, or to volunteer/nominate a Guest Editor, contact the OLAQ Coordinator.

Vol./No.	Theme	Deadline	Pub. Date	Guest Editor
Vol 18 • No. 1 Spring 2012	<i>New(ish) Directors</i>	February 1, 2012	March 15, 2012	Robert Hulshof-Schmidt, Oregon State Library
Vol 18 • No. 1 Spring 2012	<i>Advocacy</i>	June 1, 2012	July 15, 2012	Kim Read, MLS Student, Oregon College of Oriental Medicine

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