

# Narrative

## 1. Need and Rationale

Oregon has more than 200 museums, 300 public and academic libraries, and dozens of public archives. While individuals associated with these organizations have said their collections need attention and their staffs need training, a comprehensive assessment of institutional collections needs, such as the one proposed here, has not been undertaken. A few studies have shed light on preservation needs, but none during the past decade have comprehensively identified and evaluated specific statewide preservation issues, including staffing, storage conditions, disaster preparedness and training needs.

In 1995, the Oregon Library Association surveyed libraries' preservation needs, including training and disaster preparedness. Training was requested repeatedly by responders, but the study committee concluded that the OLA could not establish a successful preservation network by itself. A 2003 survey for the Libraries of Eastern Oregon revealed that "many libraries weren't aware that they had heritage needs."

Surveys and community meetings that were part of the creation of the 2005 Oregon Heritage Plan and the 2005 State Historic Preservation Plan found that after money, the most urgent heritage need was for training. However, information on the specific preservation and training needs was not gathered.

A 2006 survey by the Oregon Museums Association and the Oregon Heritage Commission used a few questions based upon the Heritage Health Index questionnaire to identify potential major preservation issues. Responses indicated that museum collections in Oregon were generally in worse condition than national levels. For example, the HHI showed 62 percent of heritage institutions nationally had temperature controls and 50 percent humidity controls, while the Oregon survey showed just 54 percent of its museums had temperature controls and 25 percent had humidity controls.

The State Archives updates guides on the location of historic county records about every three years, collects some data on storage conditions and preservation needs of those records, but does not compile the results. These reports show many records are located in areas of courthouses, corrections facilities, libraries, historical societies, schools, school administration buildings, engineering offices, genealogical research facilities, and garages without adequate preservation conditions.

Apart from the 1995 library survey, none of these surveys has queried cultural institutions regarding emergency plans. Moreover, most of the emergency plan training offered in Oregon in the past eight years has been targeted primarily to library professionals, mostly in the Portland metro area. The Western States and Territories Preservation Assistance Service has recently offered workshops around the state, again, mostly for librarians. By the end of this year these will have reached approximately 50-60 people from 41 institutions. Several museums have prepared emergency plans in order to receive federal grants, but most cultural institutions, including the Oregon State Capitol where a fire recently damaged hundreds of historic items in the governor's office, do not have emergency plans for collections.

The state's nine federally recognized tribes, which over the past couple of decades worked to re-invigorate their cultural programs, also face the same, or greater, preservation issues.

During the past decade, public support for collecting institutions appears to be level or declining. The State Legislature in 2003 discontinued funding for the Oregon Historical Society after a century of support. In 2007, the Legislature provided new support for OHS, but below previous levels, and the society's leaders

will go back to the Legislature in 2009 to battle to retain support during declining economic conditions. At the county level, many museums, libraries and archives have found commissioners less forthcoming than previously with funding, especially in counties losing federal in-lieu-of-property-tax payments.

In summary, Oregon's museums, libraries and archives would benefit from a plan implementing all four recommendations of the Heritage Health Index in order to ensure the longterm health of collections, and to bolster training efforts, disaster preparedness, and public support for preservation. The plan must address specific Oregon preservation needs based on Oregon's special conditions:

- ◆ Many museums, historical societies, and libraries are staffed by volunteers or paraprofessionals who may lack the necessary training to ensure that collections are adequately cared for.

- ◆ The Northwest has minimal preservation services; Oregon is particularly weak in professional training opportunities in preservation, especially in comparison to California and Washington, which have strong preservation initiatives and professional training programs.

- ◆ Distance and other geographic barriers, such as the Cascade Mountain range, make cross-state travel problematic. About two-thirds of the state's population is located in the Willamette Valley and Portland. However, someone could travel 400 miles from Jordan Valley (where a Basque community has formed a unique collection) and still not reach Portland.

- ◆ The varied geography of the state offers diverse preservation challenges and risks, including the potential for earthquake, tsunami, volcanic eruption, and extreme temperature variations. Two-thirds of the state is arid or semi-arid, but the rest receives considerable precipitation. This creates different collections care and disaster preparedness issues.

- ◆ Some rural communities and organizations still rely on phone modems for their Internet connections which make online communication for training and meetings problematic. However, urban areas are highly connected and their residents are more accustomed to online communication and training.

- ◆ There is a lack of dedicated public funding for preservation efforts in all parts of the state. To succeed, the statewide preservation plan must appeal to city and county governments, foundations, professional organizations, and private donors for support and implementation.

- ◆ The Oregon Library Association, the Northwest Archivists, the Oregon Museums Association, and the Oregon Heritage Commission all currently provide some preservation training, but most classes and workshops take place in the Willamette Valley/Portland urban corridor.

## **2. The Planning Process**

The objectives of the proposed planning project are to:

- Survey collections organizations about their general preservation needs as they relate to the recommendations of the Heritage Health Index.
- Conduct five regional meetings to gather additional data about preservation needs, collections management systems, and viable delivery systems for further training and assistance.
- Conduct summit of leaders of the state's major library, archives and museum organizations to collaboratively create a statewide preservation plan that addresses all four Heritage Health Index recommendations: providing safe conditions for collections, developing an emergency plan, assigning responsibility for collections care, and marshalling public and private support for and raise public awareness about collections care.
- Present the statewide preservation plan to organizational boards, state leaders and community decision makers, publish on several websites and in print. This plan will be usable in supporting the solicitation of private and public funds to enable its implementation.

## PARTNERS AND STEERING COMMITTEE

The Oregon Museums Association will administer the grant on behalf of the partners in this project. The partners in this proposal are Northwest Archivists (NWA), the Oregon Heritage Commission (OHC), the Oregon Historical Society (OHS), the Oregon Library Association's Preservation Round Table (OLA), the Oregon Museums Association (OMA), the Oregon State Archives (OSA), the Oregon State Library (OSL), and the Tamástslíkt Cultural Institute.

The partners have formed a Steering Committee that uses a collaborative, consensus team leadership. OMA president Kyle Jansson, who is also the coordinator of the Oregon Heritage Commission, will take the lead role on the Committee and serve as the Project Director/Grant Administrator. Other members of the Steering Committee (and their affiliations) are Terry Baxter (NWA immediate past president), Mary Ann Campbell (OHS Director of Research Services), Gardner Chappell (OMA vice president and Douglas County Museum director), Shawna Gandy (OHS reference archivist and OLA), Normandy Helmer (University of Oregon Libraries), Mary Beth Herkert (OSA State Archivist), Katherine Huit (OMA), Kris Kern (Portland State University preservation/catalog librarian and OLA), MJ Koreiva (OMA), Marsha Matthews (OHS Director of Public Services), Randall Melton (Tamástslíkt Cultural Institute), Jim Scheppke (OSL State Librarian), and Alex Toth (Pacific University Library and OLA). Other stakeholders from Oregon cultural heritage organizations will be invited to serve on this committee and its subcommittees to ensure geographical, organizational and cultural diversity. The Steering Committee will work through face-to-face, teleconference and virtual meetings. Each partner is prepared to contribute at least 100 hours of work on the project.

The Steering Committee will compile a comprehensive mailing list of museums, archives and libraries prior to the start of the grant and select the Project Coordinator, with whom the OMA will contract. Then, the Steering Committee will, with the assistance of the contracted Coordinator, develop a survey form to solicit from individuals and organizations the preservation needs of museums, libraries and archives. This initial survey will primarily use online questionnaires, although printed questionnaires will be needed to reach some of the smaller and more remote institutions and to maximize participation. Participating statewide organizations will include survey contact information about the projects in their newsletters, websites, and emails, and encourage their members to respond. The League of Oregon Cities, the Association of Oregon Counties and other organizations will be asked to include a news release about the project in their newsletters. Committee members will also interact with the National Tribal Archives Conference taking place in Oregon during the survey period and the National Leadership for Libraries Grant being managed by the University of Oregon.

At the same time, the regional forums will take place in all geographic regions of the state. The Coordinator will be responsible for the forums and use regional library, museum and archives leaders or Steering Committee members to maximize attendance. The forums will solicit similar preservation information, gather additional information about existing collections preservation systems, identify preferred training methods and delivery barriers, and collect other concerns and information. Phone calls will also be made to selected organizations not participating in the survey or forums in order to gather preservation information from non-participants. The forum and survey information will be compiled by the Coordinator and presented to the Steering Committee. Results will also be posted online at the Oregon Museums Association, Oregon Library Association, and Oregon Heritage Commission websites.

The Steering Committee will invite leaders of statewide library, archives and museum organizations to a one-day workshop, as well as other cultural leaders to ensure geographic and cultural representation. The Coordinator will use the compiled survey results and the HHI recommendations to lead the workshop participants through development of a coordinated, collaborative plan aimed at addressing preservation and

training needs. The plan will include benchmarks to measure progress toward improved preservation and HHI measures. The Coordinator will edit the plan and present it to the Steering Committee.

The plan will be adopted and published by the Steering Committee, with each participating organization asked to help carry it out. The plan will be presented to organizational boards, state leaders and community decision makers, and posted on the OMA, OLA, and Oregon Heritage Commission websites. This plan will be usable in supporting the solicitation of private and public funds to enable its implementation

In order to sustain this effort into the future and create long-term benefits and impacts, the partners will use the plan to focus training and support provided by their individual organizations, to inform their grant-making (such as the Oregon State Library's Library Services and Technology Act grant programs), to coordinate grant-seeking activities, and to advocate for public and private support. Leaders of the project partners will meet following the project completion to identify specific measures needed to meet the plan's benchmarks and to maximize financial and institutional support. The plan will be the basis of funding proposals to IMLS, other public organizations and private foundations beginning in 2010. As an example, partners who are eligible for cultural development grants from the Oregon Cultural Trust will use the plan to seek a grant to help implement the stated goals.

The partners will also encourage their members to support the training initiatives in their local communities by sponsoring trainings at their libraries, museums and archives, and by encouraging communities to devote more resources to preservation of cultural collections.

One long-term benefit of this project is the development of baseline data needed to plan and evaluate future initiatives. This project will also contribute to the knowledge of paid and volunteer staff at collecting institutions regarding the major aspects of preservation of cultural collections. It will encourage institutions to think carefully about their collections management and how they can seek out resources to improve care of historical materials.

### **3. Project Resources: Budget and Personnel**

**Project Director/Grant Administrator:** OMA President Kyle Jansson will lead the project's Steering Committee, prepare interim and final performance reports, and serve as contact with IMLS and contractors.

**Project Coordinator:** Prior to being awarded a grant, the Steering Committee will select a qualified person or firm to be the Coordinator. (The Steering Committee was compiling names of qualified persons, firms and organizations as this application was being submitted.) The Coordinator will be familiar with the HHI report and recommendations, help draft the online preservation and training survey with the Steering Committee, organize and carry out the comprehensive mailings announcing the survey, make room and equipment arrangements for the five regional forums, promote and lead the discussions at the forums, arrange for notetaking at the forums, compile the results of the online survey and the forums, and submit a compilation report and analysis to the Steering Committee. The Coordinator will also make the room and equipment arrangements for the training summit, lead discussions following an agenda developed with the Steering Committee, arrange for notetaking at the summit, and submit a draft final report of the summit findings and recommendations to the Steering Committee. When the final report is approved, the Coordinator will create a printable publication and arrange to have it posted on websites. The OMA will contract with the Coordinator.

**Steering Committee:** Members will compile the project mailing list, help create the preservation needs survey, participate in and encourage others to participate in the project and its forums, review report drafts, work collaboratively with other Steering Committee members, and provide in-kind resources to the project when able.

Web Assistants: MJ Koreiva, OMA webmaster, and Kyle Jansson, Oregon Heritage Commission, will make certain that materials are posted on the project's website, and arrange for other web assistance as necessary.

Financial Officer: Steve Greenwood, the OMA treasurer and curator of the Wells Fargo Museum in Portland, will be the lead person who will submit annual financial reports on behalf of OMA. Because this grant would be substantially larger than the current OMA expenditures, the grant funds will be transferred to the finance and accounting division of the Oregon Historical Society. OHS will disburse funds (after OMA approval), document all transactions, and prepare regular financial accounting reports suitable for OMA and for submission to IMLS.