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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

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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.