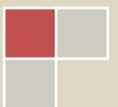


May 2011

Oregon
Connecting to Collections
Project
**Needs Assessment
Report**

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



The Oregon Connecting to Collections (C2C) Project was made possible by a grant from the U.S. Institute of Museum and Library Services to the Oregon Museums Association in partnership with the Northwest Archivists, Oregon Heritage Commission, Oregon Historical Society, Oregon Library Association, Oregon State Archives, Oregon State Library, and Tamaštlikt Cultural Institute.

The report was written by Project Coordinator, Ruth Metz, in consultation with the Project Steering Committee. Appendix C, Preservation Education Resources, was created by C2C Steering Committee members Shawna Gandy, MJ Koreiva, and Terry Baxter. Appendix D, Preservation Funding Resources, was created by Shawna Gandy and M.J. Koreiva.



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Executive Summary

Background

Oregon has more than 200 museums, 300 public libraries, and dozens of archives. While individuals associated with these organizations have said their collections need attention and their staffs need training, a formal assessment of preservation needs has not been addressed until now.

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 Index¹ (HHI) to identify the needs of Oregon's archives, libraries, and museums in preserving Oregon's cultural heritage collections.

The Oregon C2C project included five regional forums, a statewide survey, analysis of findings, a Leaders' Summit, and this final report. The Oregon C2C project was made possible by a grant from the U.S. Institute of Museum and Library Services and contributions by the partner organizations.

The forums provided anecdotal data from 88 participants in five locations: Eugene, Portland, Medford, Bend, and Pendleton. The *Oregon Preservation Survey* was available online from the October 24, 2010 through November 30, 2010. Two hundred individuals from Oregon's archives, libraries, and museums responded.

Current Conditions

Oregon's heritage institutions, including its nine federally recognized Native American tribes, face an enormous preservation challenge. Over the last decade, public funding for collecting institutions appears to be flat or declining. The current economic downturn has made the task of preserving Oregon's collections even more daunting. According to the preservation survey:

- 25% of heritage institutions have no funds whatsoever allocated to preservation;
- The mean institutional preservation spending for 2010 was about \$2,000;
- Over half of the institutions represented in the survey have no paid staff expressly for preservation;
- Eighty-five percent of institutions do not have a disaster preparedness plan that is current and ready to be activated.

¹ The Heritage Health Index refers to the report, *A Public Trust at Risk: The Heritage Health Index Report on the State of America's Collection*, published in December 2005. It concluded that immediate action is needed to prevent the loss of 190 million artifacts that are in need of conservation treatment.

Preservation Needs

The needs of those who are responsible for preserving Oregon's cultural heritage are great. The needs assessment identified 47 specific preservation learning needs in six categories. The discreet needs by category are listed in Appendix F. In addition to disaster preparedness training, the most urgent needs are as follows:

1. Collection care
 - a. Best practices for storage and handling by collection format
 - b. Understanding environmental conditions and how to monitor them
 - c. Drafting and implementing a disaster response plan and team
 - d. Choosing archival enclosures and boxes
 - e. Conducting a collections condition assessment
 - f. Setting preservation priorities
 - g. Understanding and choosing reformatting options (microfilm, digital, etc.)
2. Collection management
 - a. Make the case for preservation with our board, parent institutions, and donors
 - b. Engage the public in financially supporting our preservation agenda
 - c. Reach out to and engage youth
3. Advocacy
 - a. Write winning proposals and grants
 - b. Engage the public in financially supporting preservation
 - c. Recruit, train, and retain a workforce of staff or volunteers
4. Planning
 - a. Develop long-range preservation plans and set priorities
 - b. Fund-development planning
 - c. Disaster response and recovery planning
5. Technology
 - a. Keep up with technological change
 - b. Resolve formatting issues
 - c. Understanding applicable web trends
 - d. Apply technology efficiently
 - e. For a cadre of respondents, basic computer skills:
 - f. troubleshoot computer hardware and do basic maintenance and repair
 - g. use a computer

The types of collections in most urgent need of care:

1. photographic items
2. historical objects
3. moving images

4. textiles
5. recorded sound
6. unbound sheets
7. digital materials

Learning can take the following forms:

1. training
2. information
3. consulting
4. mentoring

Training Readiness

Learners generally prefer on-site, face-to-face consulting and training. Some are able to use technology to access information, training, consulting, and mentoring while others are not. Learners are willing to pay for training and consulting. However, the amount most are willing to pay may not be sufficient to provide the needed training and consulting. Learners' available time for training is generally less than an hour per week.

Next Steps

On March 7, 2011, leaders from Oregon's archival, library, and museum organizations and agencies assembled to consider the findings of the needs assessment and to recommend next steps. Those who attended are listed in Appendix E. They determined that Oregon needs a structure for planning and funding preservation in Oregon.

They recommended that the C2C Committee ask 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 advisory board would be made up of the representatives of professional organizations such as the Oregon Museums Association, the Oregon Library Association, the Northwest Archivists Association, and agencies such as the Oregon State Archives, the Oregon State Library, the Oregon Historical Society, and so forth.

The suggested initial planning agenda for the recommended advisory board is:

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

C2C Project Director, Kyle Jansson and Project Coordinator, Ruth Metz presented this report to the Oregon Heritage Commission on April 7th, including the request to establish an advisory body specific to preservation to continue interdisciplinary collaborative planning and selective grant acquisition. The Commission encouraged a formal proposal which will be developed by the C2C Steering Committee on May 9, 2011 and presented to the Commission on July 18, 2011 at its meeting at Timberline Lodge.

Priorities in Planning

A 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 plan should take into account the population dichotomy of Oregon and the inherent difficulties posed by distance and disproportionate resources. Almost 78% of Oregon's 3.8 million inhabitants live in metro areas, much of it concentrated in the Willamette Valley which stretches from Eugene in the south through Corvallis and Salem to Portland. The distances from rural to urban areas can take the better part of a day or more. Computer technology and skills are more ubiquitous in the metropolitan counties than in the rural counties.

Once established, the advisory board should consider these additional elements in planning for Oregon's preservation agenda:

- A coordinated, sustainable, and dynamic virtual resource for staff and volunteers to find specific information, consulting, training, and mentoring for the purposes of preserving Oregon's heritage collections.
- Acquisition of computer technology particularly in the rural areas of the state where this technology is absent.
- Face-to-face technical assistance to install computers and to train largely volunteer staff to use the computers and the virtual resource.
- Network support for learning and sharing resources statewide and regionally.

Acknowledgements

This report and the project leading up to it, *Connecting to Collections*, was made possible through the collaboration and financial contributions of several Oregon partner organizations. These partners are grateful to the U. S. Institute of Museum and Library Services for funding a grant submitted by the Oregon Museums Association on behalf of the partner organizations. The partner organizations are:

1. Northwest Archivists
2. Oregon Heritage Commission
3. Oregon Historical Society
4. Oregon Library Association
5. Oregon Museums Association
6. Oregon State Archives
7. Oregon State Library
8. Tamaʻslikt Cultural Institute

The project is directed by Kyle Jansson, immediate past president of the Oregon Museums Association and coordinator of the Oregon Heritage Commission. The project has been steered by a committee of partner and institutional representatives. The Steering Committee members are:

1. Terry Baxter, Multnomah County Archives and past president of Northwest Archivists
2. James Bunnelle, Co-Chair of the Preservation Roundtable of the Oregon Library Association and Acquisitions/Collection Development Librarian, Lewis and Clark College
3. Gardner Chappell, Oregon Museums Association President and Douglas County Museum
4. Tiah Edmunson-Morton, Archivist, Oregon State University, and past president of Northwest Archivists
5. James Fox, Head, Special Collections and University Archives University of Oregon Libraries
6. Shawna Gandy, Collections Access Specialist, Oregon Historical Society Research Library, and Secretary, Preservation Roundtable of the Oregon Library Association
7. Dave Hegeman, Business Reference Librarian, Special Collections Coordinator, Oregon State Library
8. Normandy Helmer, University of Oregon Libraries
9. Mary E Herkert, Oregon State Archives
10. Kris Kern, Oregon Library Association representative and Fine and Performing Arts Librarian, Portland State University Library
11. MJ Koreiva, Oregon Museums Association and Umpqua River Lighthouse Museum
12. Larry Landis, Archivist at Oregon State University
13. Marsha Matthews, Oregon Historical Society Director of Public Services
14. Randall Melton, Tamaʻslikt Cultural Institute
15. Judith Norton, Head, Access Services, Oregon Health & Science University Library
16. Layne G Sawyer, Oregon State Archives
17. Jim Scheppke, State Librarian of Oregon
18. Keni Sturgeon, Curator & Museum Director, Willamette Heritage Center
19. Alex Toth, Oregon Library Association representative and Pacific University Library
20. Robyn Ward, Oregon Library Association, Co-Chair of the Preservation Roundtable and Serials Digital Access Specialist, Lewis and Clark College Aubrey R. Watzek Library
21. Lindy Trolan, Confederated Tribes of the Grande Ronde Indian Reservation

Introduction

A statewide preservation needs assessment was undertaken in 2010 for “The Oregon Preservation Assessment and Education Planning Project.” It was commissioned to identify the needs of Oregon’s archives, libraries, and museums in preserving Oregon’s heritage collections. Throughout this report, the project is called *Connecting-to-Collections* (C2C).

The needs assessment and the planning that ensued was made possible by a grant from the U.S. Institute of Museum and Library Services. This report was a point of departure for a leadership summit which will take place March 7, 2011 in Salem at the Oregon State Library. Selected leaders of about a dozen of Oregon’s archival, library, and museum agencies and organizations developed an action plan to address the preservation needs of Oregon.

The action plan calls for the establishment of a preservation advisory body under the auspices of the Oregon Heritage Commission. An informal proposal has been made to the Oregon Heritage Commission which has encouraged a formal proposal. The formal proposal will and be presented to the Commission at is July 18, 2011.

Background

Oregon has more than 200 museums, 300 public libraries, and dozens of archives. While individuals associated with these organizations have said their collections need attention and their staffs need training, a formal assessment of preservation needs has not been addressed until now. A few studies have shed light on Oregon’s preservation needs but none during the past decade have comprehensively identified 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; however, the study committee concluded that the OLA could not establish a successful preservation network for training by itself. A 2003 survey 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.

Following the national Heritage Health Index (HHI) study, a 2006 survey by the Oregon Museums Association and the Oregon Heritage Commission found that museum collection conditions in Oregon were generally worse off than national levels. For example, the HHI found that institutions nationally had a substantially higher level of temperature controls and humidity controls than Oregon institutions.

The Oregon State Archives updates guides on the location of historic county records about every three years and collects some data on storage conditions and preservation needs of those records. However, it does not compile the results. Many records are located in areas of

courthouses, correctional facilities, libraries, historical societies, schools, school administration buildings, engineering offices, genealogical research facilities, and garages without adequate preservation conditions.

No recent study has queried cultural institutions regarding emergency plans. Most of the emergency plan training has been primarily for library professionals and much of that training has been for librarians in the Portland metro area.

In summary, Oregon's heritage institutions, including its nine federally recognized Native American tribes, face an enormous preservation challenge. Over the last decade, public funding for collecting institutions appears to be flat or declining. The current economic downturn has made the task of preserving Oregon's collections even more daunting.

The Oregon C2C Project

Believing that Oregon's archives, libraries, and museums, would benefit from a plan that implements all four recommendations of the HHI, the Oregon C2C project partners undertook the C2C Project. The four HHI recommendations are:

1. Institutions must give priority to providing safe conditions for the collections they hold in trust.
2. Every collecting institution must develop an emergency plan to protect its collections and train staff to carry it out.
3. Every institution must assign responsibility for caring for collections to members of its staff.
4. 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.

The project methodology has been to:

1. Stage five regional forums to obtain anecdotal information about preservation needs;
2. Conduct and analyze a statewide survey to verify and quantify the preservation needs;
3. Plan and facilitate a Leaders' Summit to develop a plan for addressing the preservation needs;
4. Produce a plan to address preservation needs, statewide.

The following section describes the finds of the needs assessment. The Respondent Profile section follows the needs assessment findings.

The Needs Assessment Findings

The needs assessment consisted of five regional forums followed by a statewide survey of those involved in preservation. The five regional forums asked participants:

1. What puts their heritage collections at risk?
2. What they think will remedy this?
3. What training they need to help preserve their institution's collections?
4. What they and their institutions need to help promote its collections?
5. What form must the training take to be of benefit to those who work in their institutions?
6. The state of their institutions' disaster preparedness.

The forums provided anecdotal data from 88 participants in five locations: Eugene, Portland, Medford, Bend, and Pendleton. Following the regional forums, the C2C Steering Committee designed an instrument for a statewide survey. The survey instrument was designed to verify and quantify the anecdotal findings. It included a taxonomy of learning needs identified in the forums. To allow for the potential to build on the taxonomy, the survey also invited open-ended input. Because the regional forums raised a number of questions about training readiness, the survey instrument gauged this as well.

The *Oregon Preservation Survey* was available online from the October 24, 2010 through November 30, 2010. In addition to being announced online through the partners' list-servs, newsletters, and websites, the Oregon Heritage Commission sent letters to its 800-person mailing list, announcing the on-line survey and offering a paper copy of the survey on request.

Funding for Preservation

When asked about needs, the regional 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. If they are not budgeting for preservation, they are probably not planning for preservation. The need for planning was validated by the survey respondents.

The survey asked if the respondents' entities were spending funds specifically for preservation. Forty-eight respondents (25%) indicated that their institutions had no funds allocated to preservation; their institutional budgets ranged from \$100 to \$12 million and the median was \$200,000. Forty-six respondents (24%) indicated that their institution's budget specifically allocated funds for preservation. The institutional budgets ranged from \$2500 to over \$21 million; the amount allocated specifically to preservation ranged from \$150 to \$80,000.

One-hundred nineteen respondents (50.26%) indicated that their institutions expected to spend from \$50 to \$360,000 on preservation, whether budgeted or not, for a total of \$2.1 million. This includes the twenty-four respondents (12.56%) that did not have an institutional budget per se but expected to spend a combined total \$82,996 for preservation purposes. The mean

preservation spending for 2010 is expected to be \$2,000. The 2010 expected spending for preservation as a percentage of the institutional budget is 1.76%.

Preservation Needs

If money was the solution, the Steering Committee wanted to know what needs more money would address. Therefore, the survey was designed to clarify the needs and to prioritize them for the purpose of future planning.

The survey affirmed and quantified the respondents' priorities for 47 specific learning needs in six categories. Respondents named several additional specific learning needs; these are also listed in this report.

6. collection care
7. collection management
8. disaster preparedness
9. advocacy
10. planning
11. technology

Respondents also identified the types of collections in most urgent need of care:

8. photographic items
9. historical objects
10. moving images
11. textiles
12. recorded sound
13. unbound sheets
14. digital materials

Respondents' affirmed that their learning can be enabled in a variety of forms:

5. training
6. information
7. consulting
8. mentoring

Respondents described their training readiness. They generally prefer on-site, face-to-face consulting and training. Some respondents are able to use technology to access information, training, consulting, and mentoring while others are not. Respondents specified how networking could help meet their needs and how information could be packaged and presented.

Respondents are willing to pay for training and consulting. However, the amount most are willing to pay may not be sufficient to provide the needed training and consulting. Respondents' available time for training in the next year is generally less than an hour per week.

Collection Care and Collection Management Needs

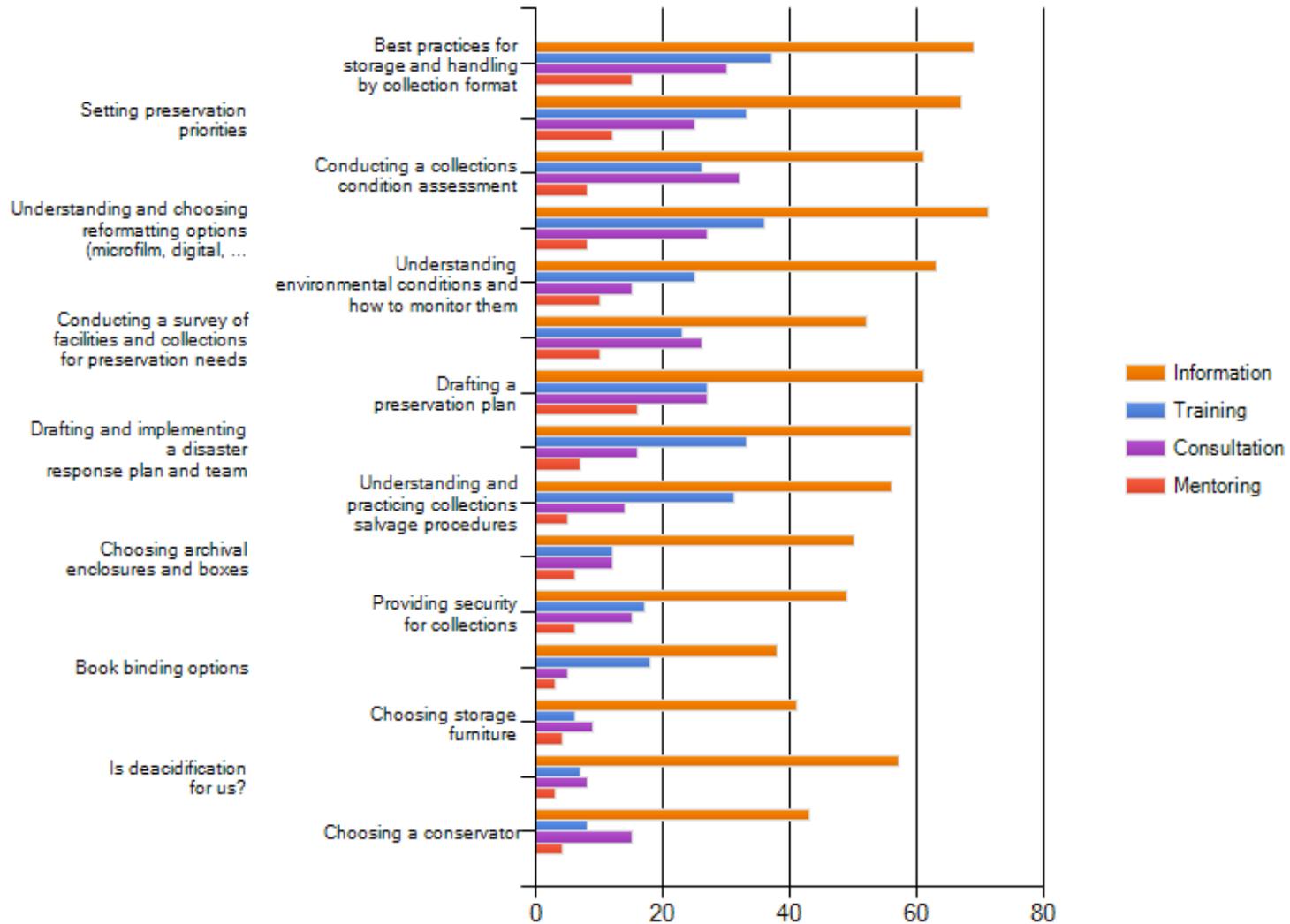
The survey tested 15 collection care and 9 collection management learning needs that were identified in the previous regional meetings. The survey respondents affirmed these needs and the following charts show the level of interest in descending order.

The survey results also show respondents' learning mode preferences: information, training, consultation, and mentoring. Information is the leading "learning" tool. Consultation and training are the next most-preferred learning modes.

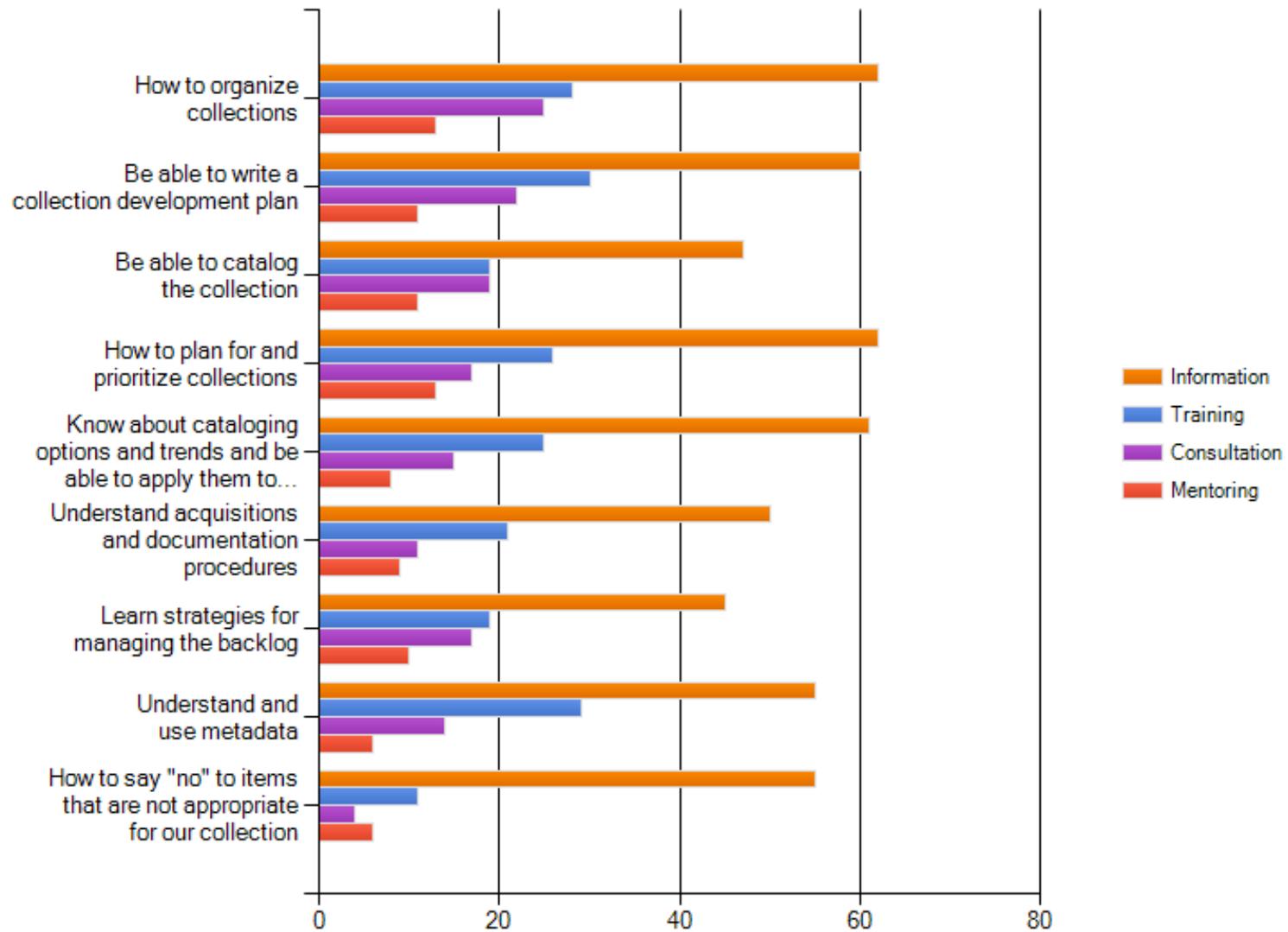
In addition to those specific needs listed in the following chart, respondents added these "other" collection care and collection management needs:

- Basics of archiving
- Paper conservation
- Basic preservation for school yearbooks and newspapers
- Digitization of photo collections
- What to include in a collections policy
- Understanding and implementing fundraising for preservation needs
- Finding a place for collections
- Working with engineers to renovate all HVAC systems

Learning Needs, Collection Care

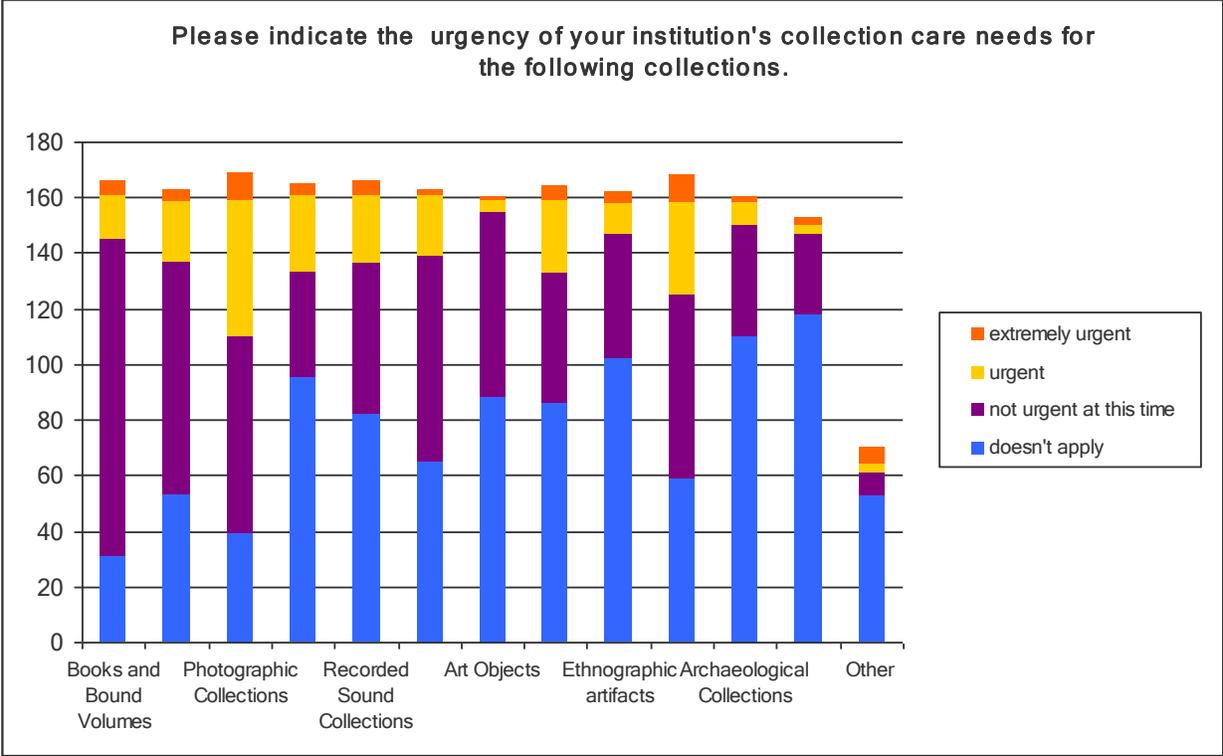


Learning Needs, Collection Management



Collections Needing Care

The most urgent need is in caring for the following collections: photographic, historical objects, moving images, textiles, recorded sound, unbound sheets, and digital materials. The respondents added these other collection care needs in addition to those listed: microfilm and microfiche, photographic film negatives, historic structures, and farm equipment.

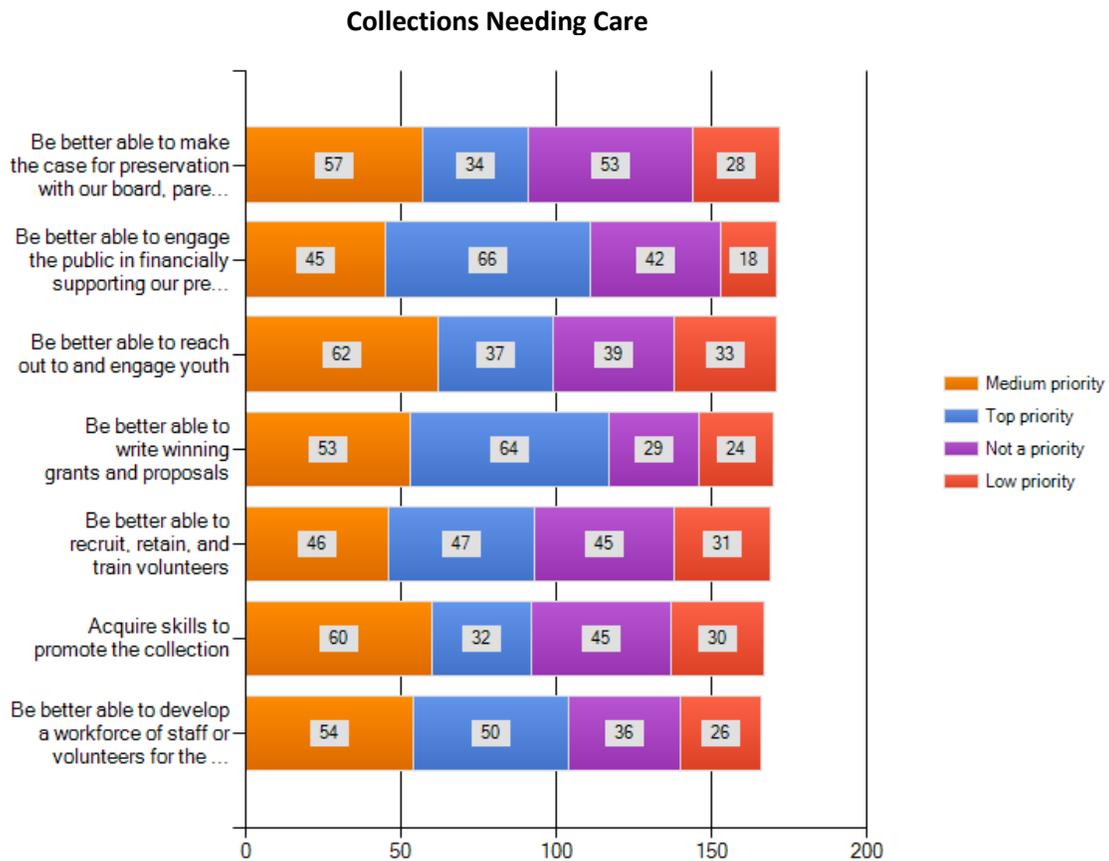


Advocacy Needs

The survey affirmed 7 advocacy needs, the most important of these having to do with acquiring resources, both financial and human:

- Becoming better able to write winning proposals and grants
- Becoming better able to engage the public in financially supporting preservation
- Becoming better able to recruit a workforce of staff or volunteers

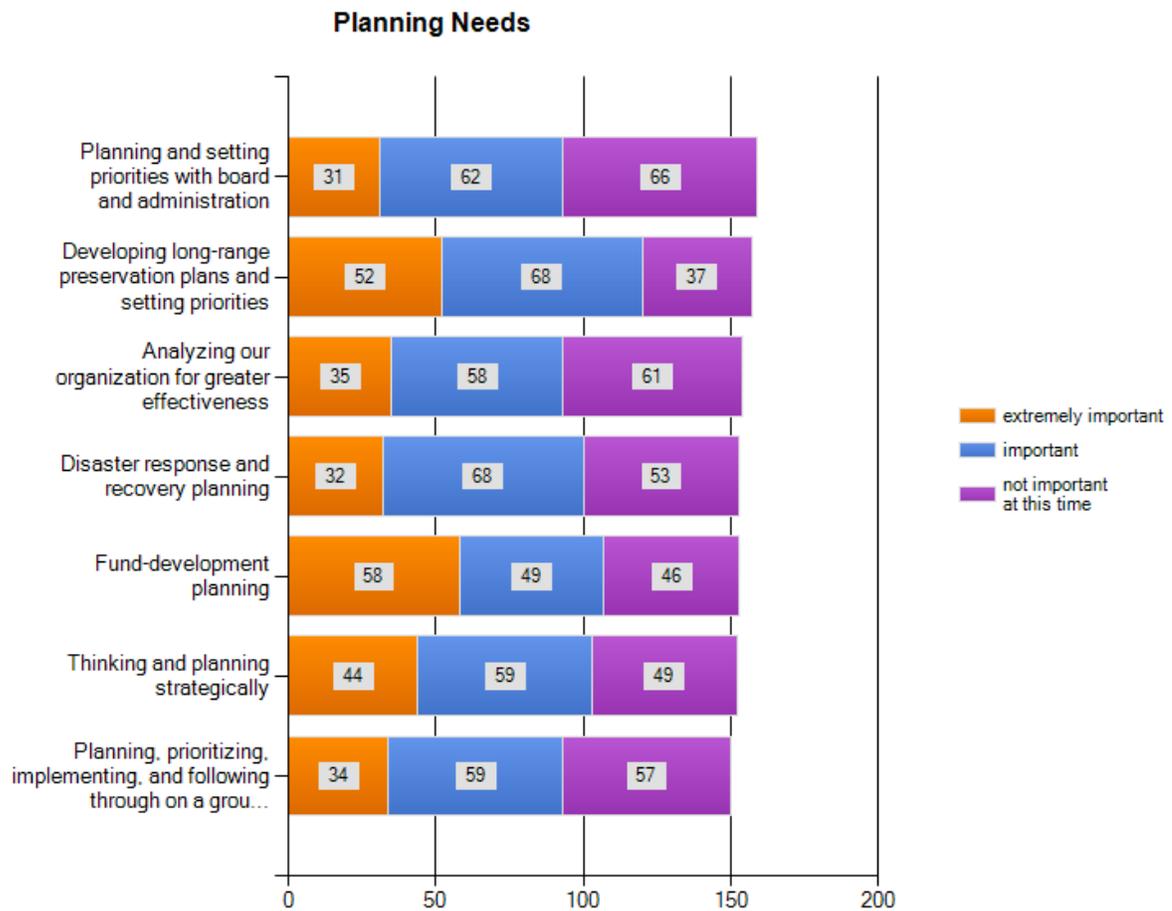
Respondents included “other” advocacy needs, such as working with the legislature, regional and local governments, organizations, and local businesses to secure funding.



Planning Needs

Respondents need planning help. The most important planning goals are:

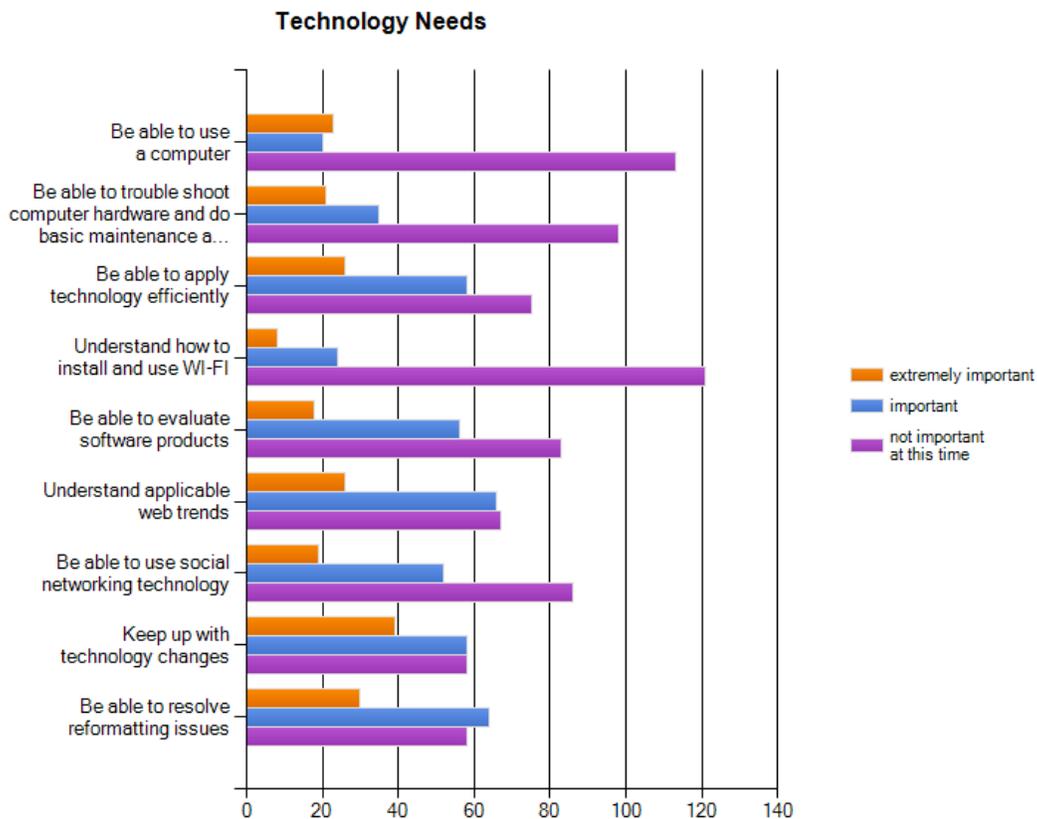
- Developing long-range preservation plans and setting priorities (63%)
- Fund-development planning (56%)
- Disaster response and recovery planning (52%)



Technology Needs

Respondents' open-ended comments suggest great variation in computer capability for individuals and their institutions. Some have very little technology capability, basic training, or knowledge of technology applicable to use by their entities. Others have equipment and the knowledge and skill to apply it toward preservation. Perhaps for these reasons, technology ranks lower overall as a priority. Still, technology needs are clearly important to many of the respondents. The most important technology needs of respondents are:

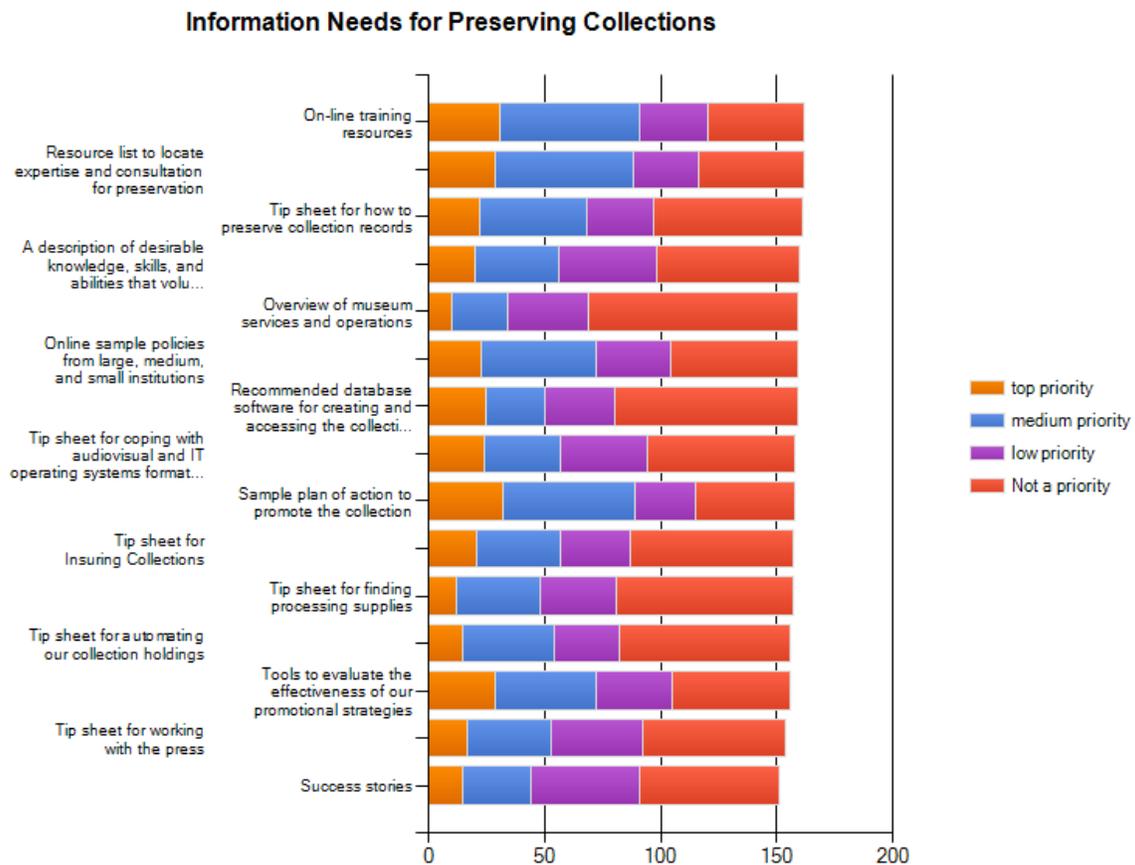
- Keeping up with technological change (51%)
- Being able to resolve formatting issues (49%)
- Understanding applicable web trends (48%)
- Being able to use a computer (44%)
- Being able to apply technology efficiently (44%)
- For a cadre of respondents, basic computer skills:
 - Be able to troubleshoot computer hardware and do basic maintenance and repair (29%)
 - Be able to use a computer (23%)



Information Needs

Respondents want samples, tools, and lists that they can access on-line. The highest-ranking of 15 specific information tools are:

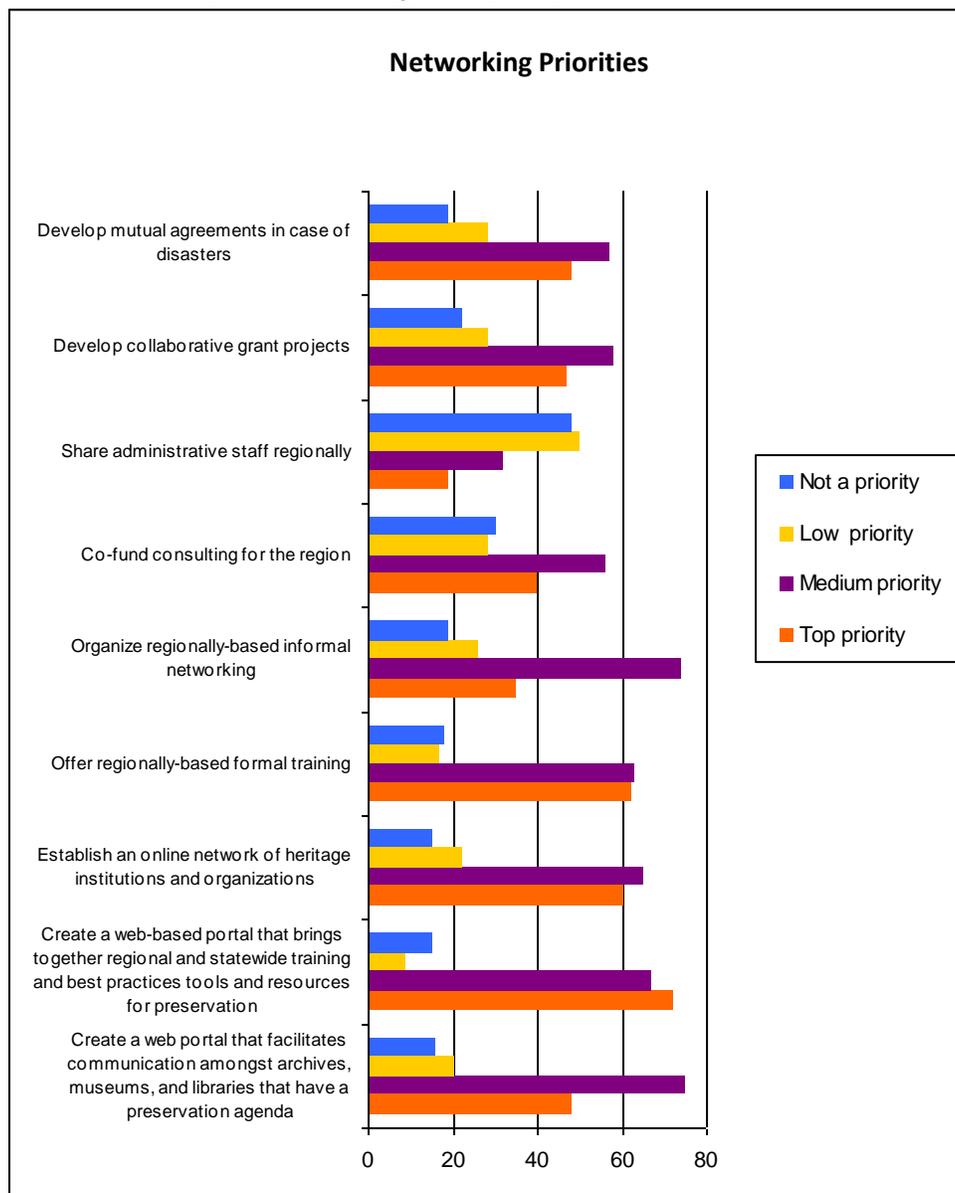
- samples of specific documents (ranked higher overall than tip sheets)
- training resources
- tools for evaluating the effectiveness of one's promotional strategies
- resource list for locating expertise and consultants for preservation



Networking Ideas

Statewide and regional networking for preservation of Oregon's heritage collections was a strongly expressed need. For planning purposes, the networking ideas that should receive the greatest attention are:

- Create a web-based portal that brings together regional and statewide training and best practices and resources for preservation (73%)
- Establish an online network of heritage institutions and organizations (65%)
- Offer regionally-based formal training (65%)
- Create a web portal that facilitates communication amongst archives, museums, and libraries that has a preservation agenda (64%)



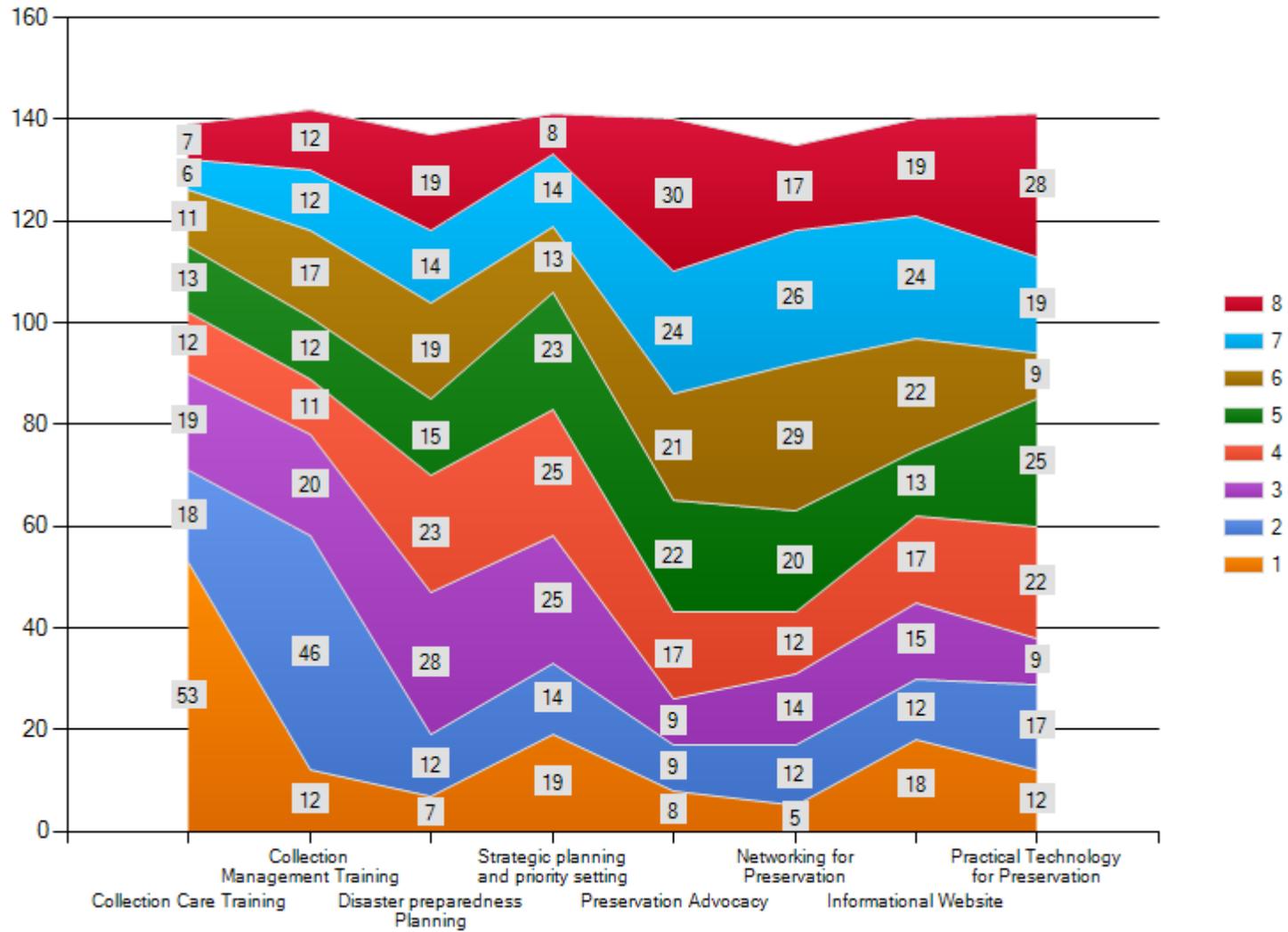
Priorities for Planning

To aid the participants of the forthcoming Leaders' Summit, the survey asked respondents to rank their priorities for preservation planning. The purpose of the summit will be to plan next steps for Oregon's preservation future. The table below shows the number of respondents that ranked each action area priority 1, 2, 3, 4, or 5, in rank order. The number preceding the preservation category is the total of respondents ranking them priority 1, 2, 3, 4, or 5.

115	Collection Care Training
106	Strategic planning and priority setting
101	Collection Management Training
85	Disaster Preparedness Planning
85	Practical Technology for Preservation
75	Informational Website
65	Preservation Advocacy
63	Networking for Preservation

The chart on the next page is a composite of the priority ranking order, priority 1 through 8, for each preservation category. These categories are not mutually exclusive. For example, an Informational Website and Networking for Preservation can be methods for addressing the collection care, collection management, disaster preparedness, strategic planning, and practical technology needs of the preservation workforce.

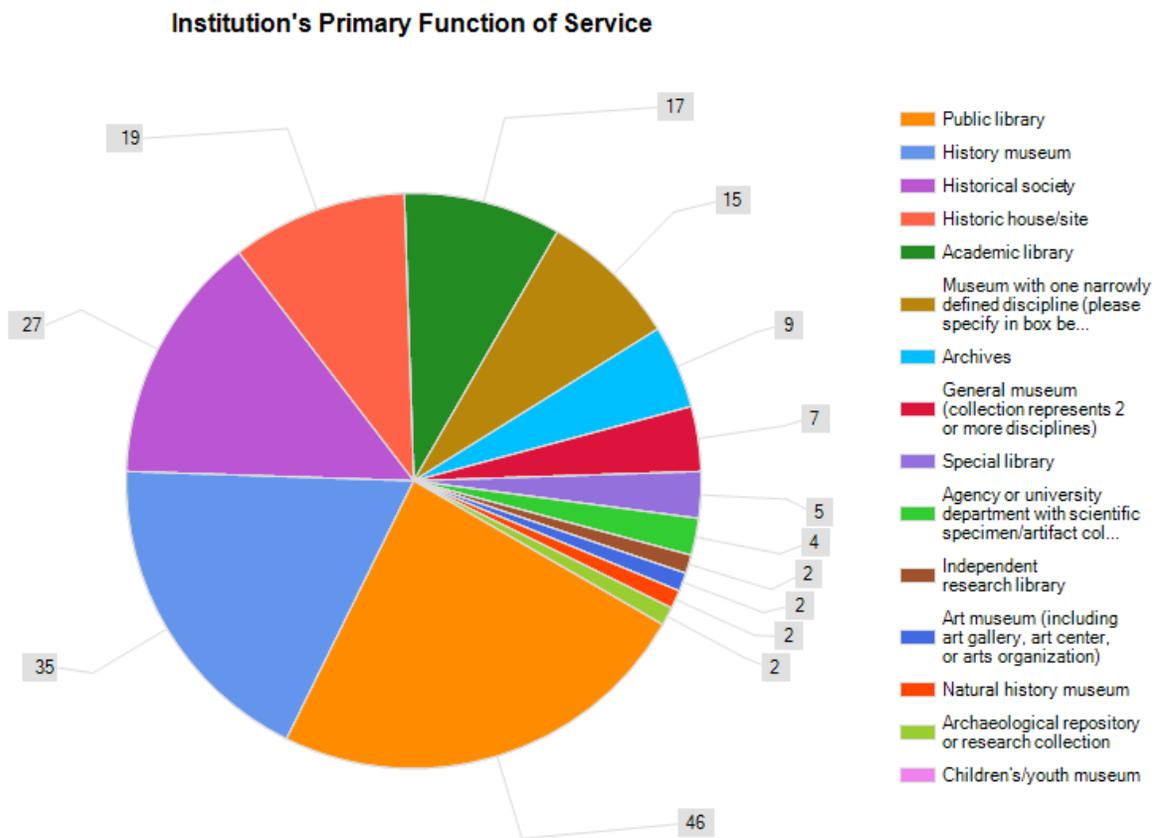
Priorities for the Leaders' Summit



Respondent Profile

The respondents were from all types and sizes of collecting entities across Oregon. A total of 200 respondents started the survey; 191 completed all or some of the survey questions. Not uncommonly, the number of responses declined as respondents progressed through the survey. The response gradually tapered off to a low of 143 by the end of the survey.

The largest number of responses were from persons associated with museums of some type (107), followed by libraries (69), archives (9), and finally, agency or institutional research or repository collections (6).

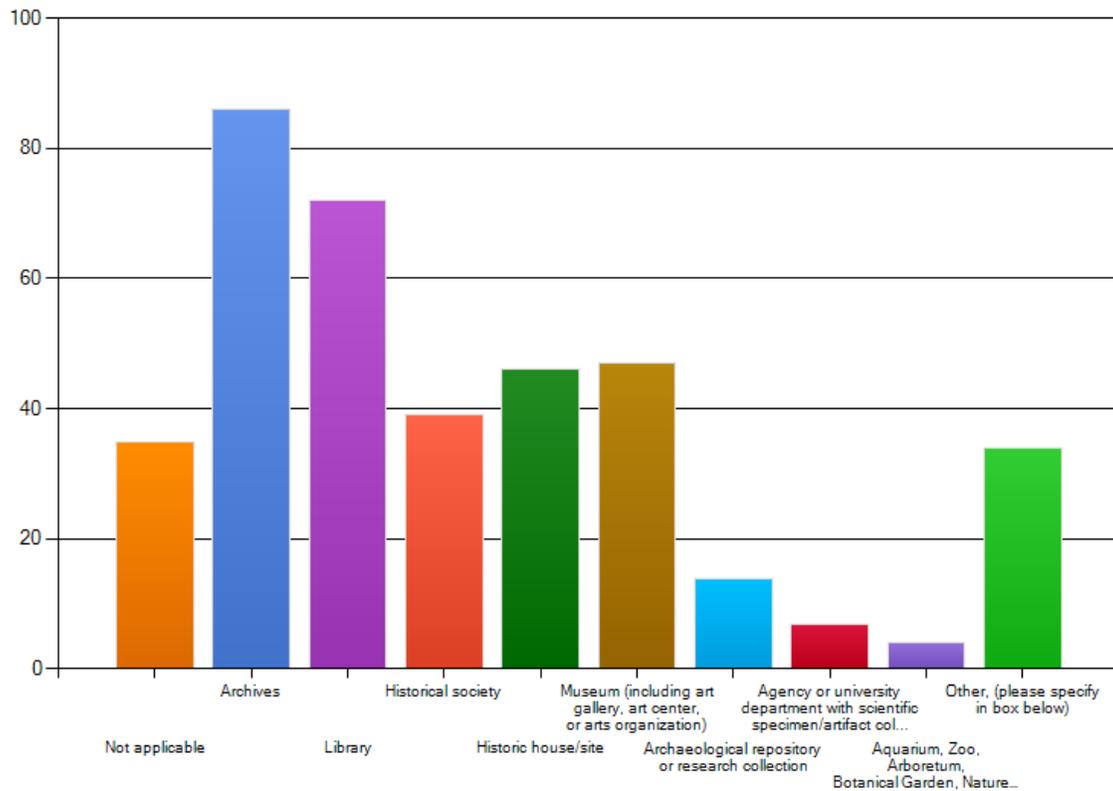


“Narrowly defined” museums, one of the institutional-type choices, included the following list:

- Tribal facility serving archive, library and exhibit functions
- Architectural heritage
- Railroad and Logging
- Film
- Printing
- Military History of Oregon Coastal Artillery
- Military Museum
- Linear historic trails & wagon roads
- Smokejumper history at nation's oldest standing aerial firefighting base, Cave Junction, southwest Oregon
- CR Management
- On-line Encyclopedia of Oregon history and culture
- Early farm life of the Harrisburg area
- Sports Hall of Fame
- Pioneer/Indian Museum
- Global forestry
- Irish Culture
- Arctic museum
- Logging
- Pacific NW commercial trucking history
- City of Gearhart landmarks commission
- Professional theatre with archives included

Most of the institutions also provide other functions. For example, some museums and libraries also include archives, some libraries include museums, and some museums include libraries. Over 45% of respondents also have archives while another 38% have libraries. Only 18% of respondents did not indicate a secondary function of their institutions.

Additional Functions or Services

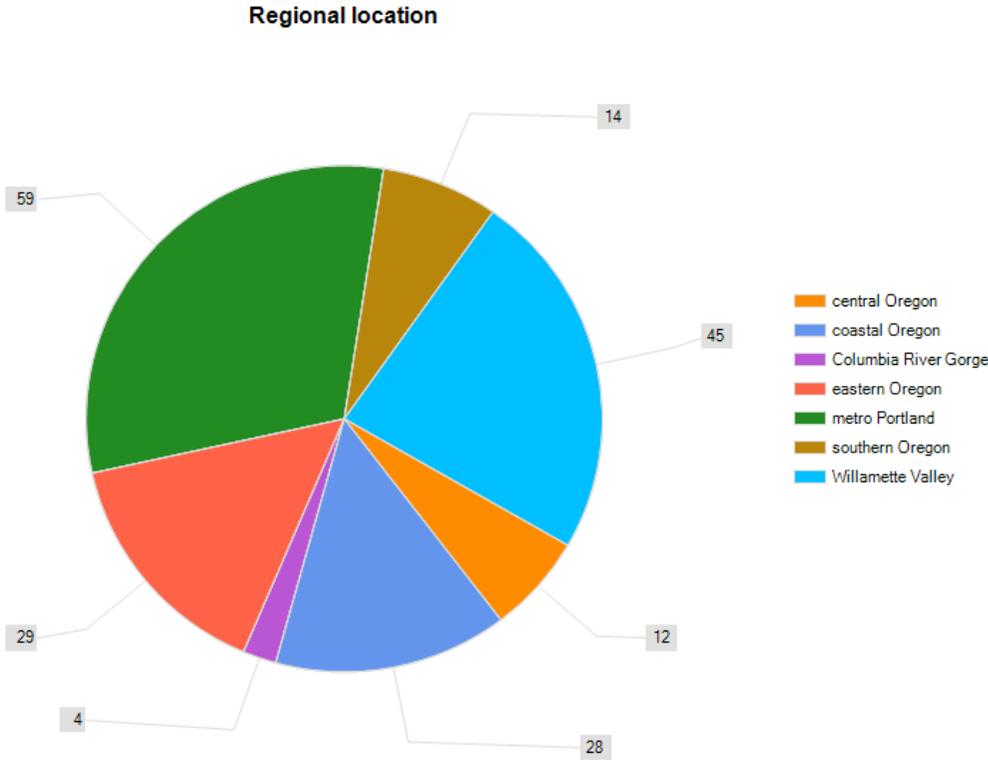


In addition to the prescribed set of 8 secondary functions written into the survey, respondents listed the following “other” functions and services:

- records management / records center
- conservation services and consulting regarding housing, repair, and preservation for paper-based items
- repository for archive of Community Participation Organization #1 Cedar Mill
- rental
- programs and exhibits
- historic railroad and logging equipment, transportation
- local history room
- film exhibition, arts learning for all ages
- local history records
- geologic survey
- historic park
- community meeting place
- guide service
- event space
- genealogical research
- tourism visitor information center
- genealogical service
- oral histories
- collect and publish local stories of historical interest
- programs on local history--lectures, tours etc.
- restoration, operation of railroad equipment
- educational web site
- records management, Publication of Oregon Blue Book and Administrative Rules, Official Documents
- some historical items and photographs are stored in the library.
- vintage clothing collection
- affiliated with adjacent botanical garden
- reception center and park. patio, gazebo
- developing website on local history
- picnic pavilion can be rented for functions, meetings, parties, etc.
- maintain and operate historical railroad equipment.
- art studio and education
- tutoring for students
- university department, visual art collection
- arts and humanities programming organization
- family heritage and history
- historic Yaquina Bay Lighthouse
- city government with historic landmarks commission, code enforcement, grants
- demonstration forests
- speakers' bureau
- general information for local area
- US Forest Service, Ochoco National Forest, Archaeologist
- fund raising in support of culture and arts
- rare books; historical books from Oregon and Pacific NW
- inventory records and historic document

Response by Region and County

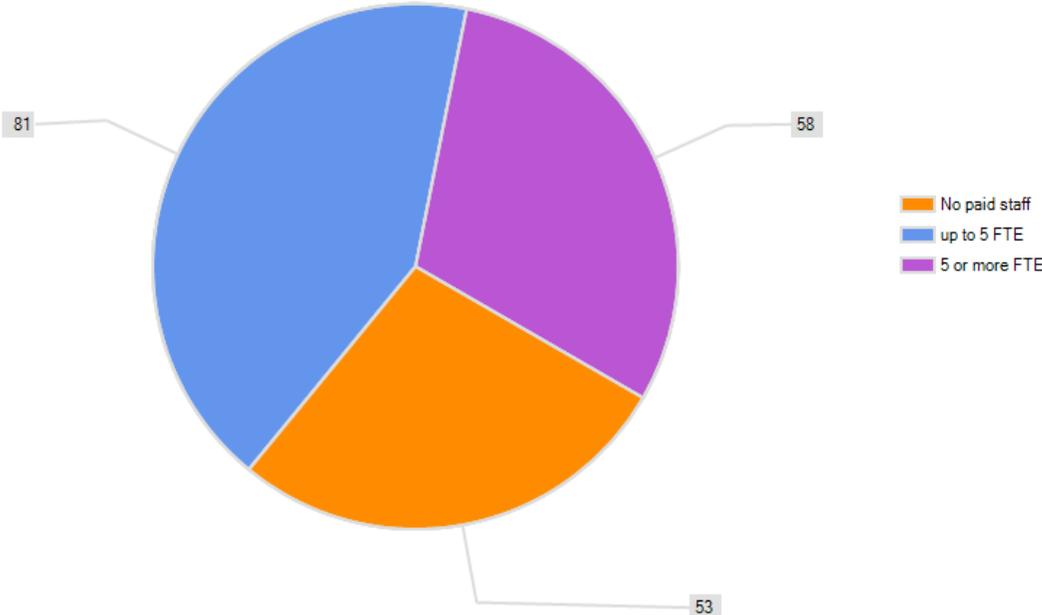
Respondents were from institutions located in all seven geographic regions of Oregon. Fifty-five percent of respondents are located in the metro Portland area or the Willamette Valley. Every county except Hood River was represented. Nearly 35% (66) of respondents were from institutions located in rural areas while 65% (125) were not from rural institutions. The survey defined rural as 50 miles or more from a population center of 20,000. A map of Oregon with counties and population by county is included in this report as Appendix A. Appendix B shows the regions of Oregon.



Size of Institutions

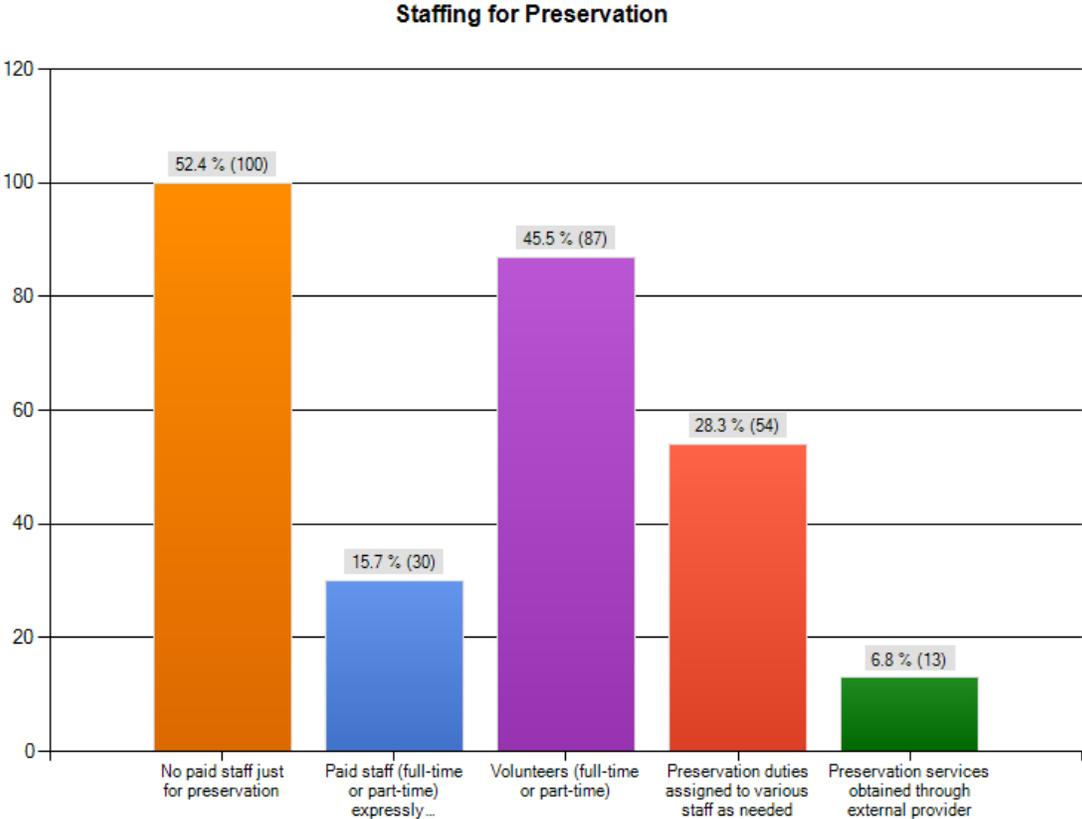
The survey asked for institutional staffing to group institutions represented in the survey. Twenty-eight percent of respondents have no paid staff at their institutions. Forty-two percent have up to 5 full-time equated (FTE) staff. Thirty percent have five or more FTE.

Size of Institutions (by staffing)



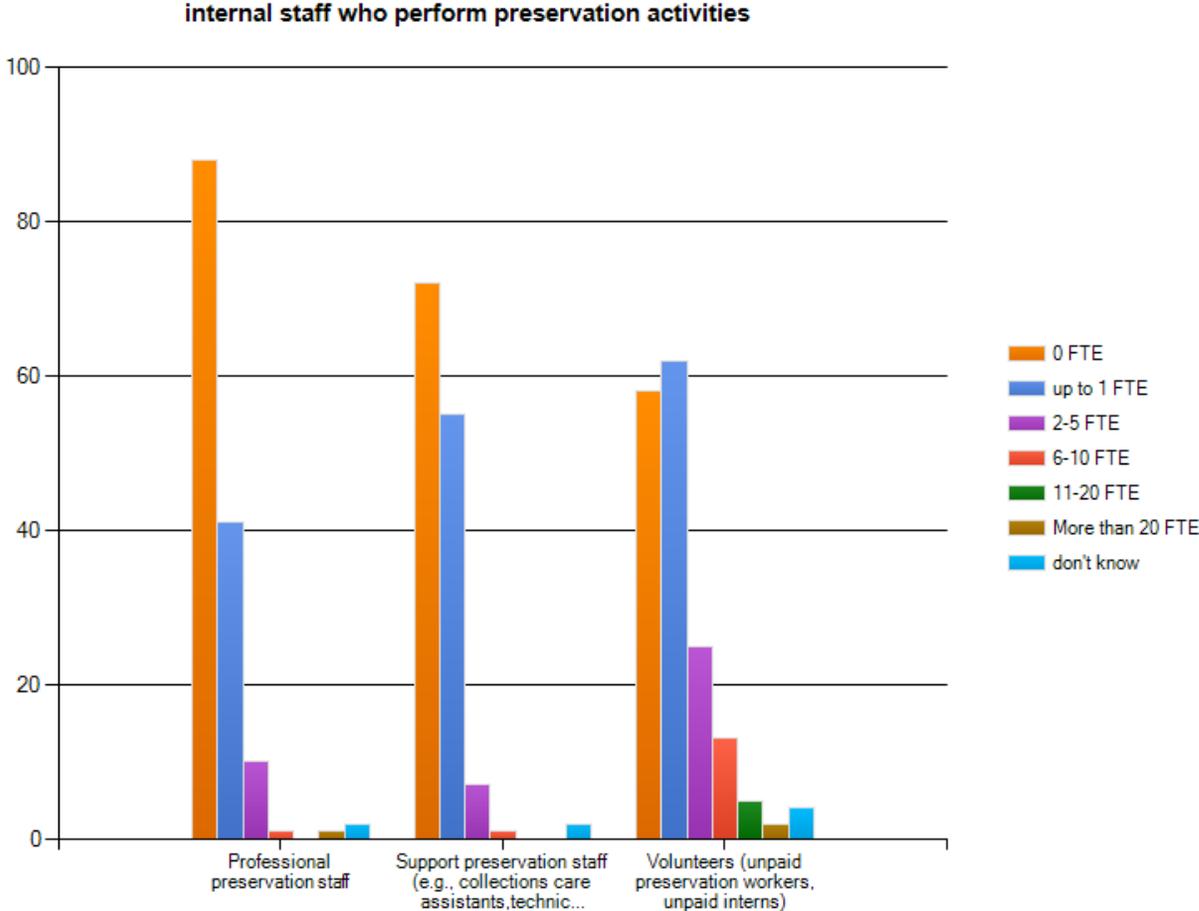
Staff for Preservation Activities

Fifty-two percent of respondents indicated that their institutions have no paid staff expressly for preservation. Sixteen percent have some paid staff, either part-time or full-time. Twenty-eight percent assign staff preservation activities. Six percent obtain preservation services externally. Forty-six percent have volunteers for preservation activities.



Staffing Levels for Preservation Activities

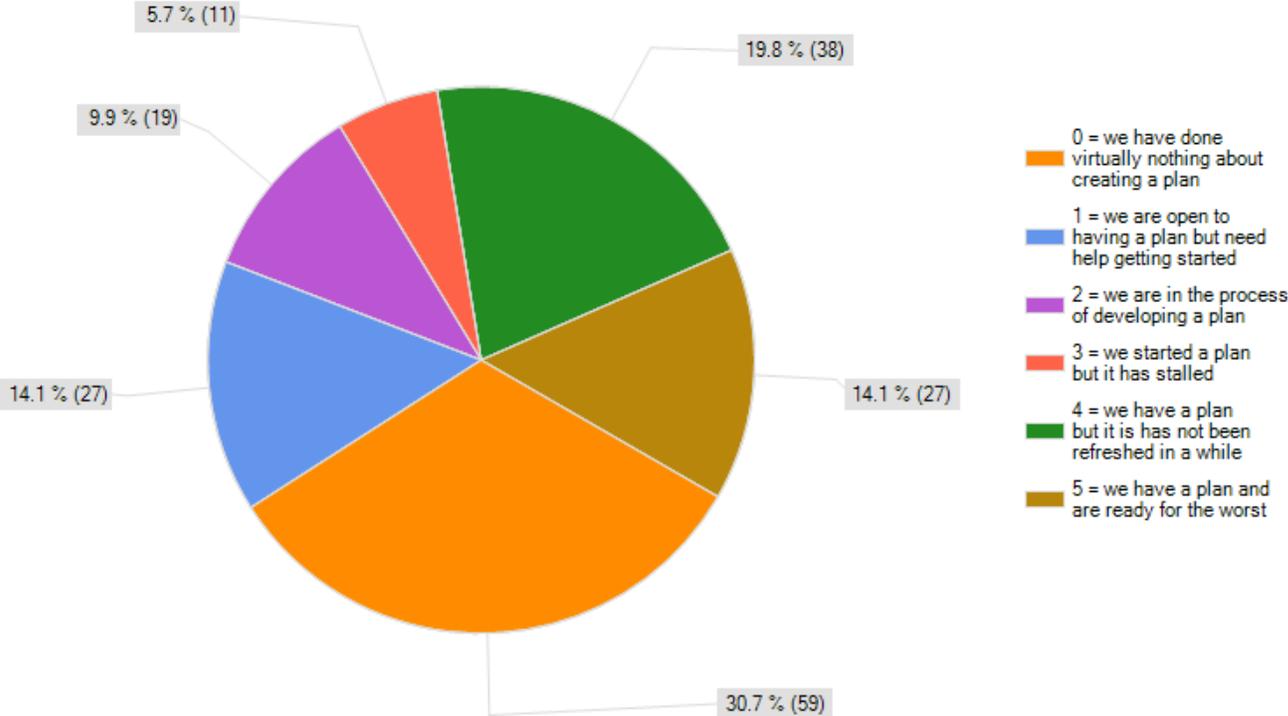
Many survey respondents do not have staff to perform preservation functions. These are represented by the orange bar in the graph below. Fifty-three respondents (28%) indicated that their institutions employ internal staff at a professional level for preservation functions. Sixty-three respondents (33%) indicated that their institutions employ staff at a support level. One-hundred-seven (56%) of respondents indicated that their institutions involved unpaid volunteers in preservation activities.



Disaster Preparedness

Eighty-five percent of 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% are in some stage of plan development or have stalled in their planning.

Status of Disaster Preparedness



Training Readiness

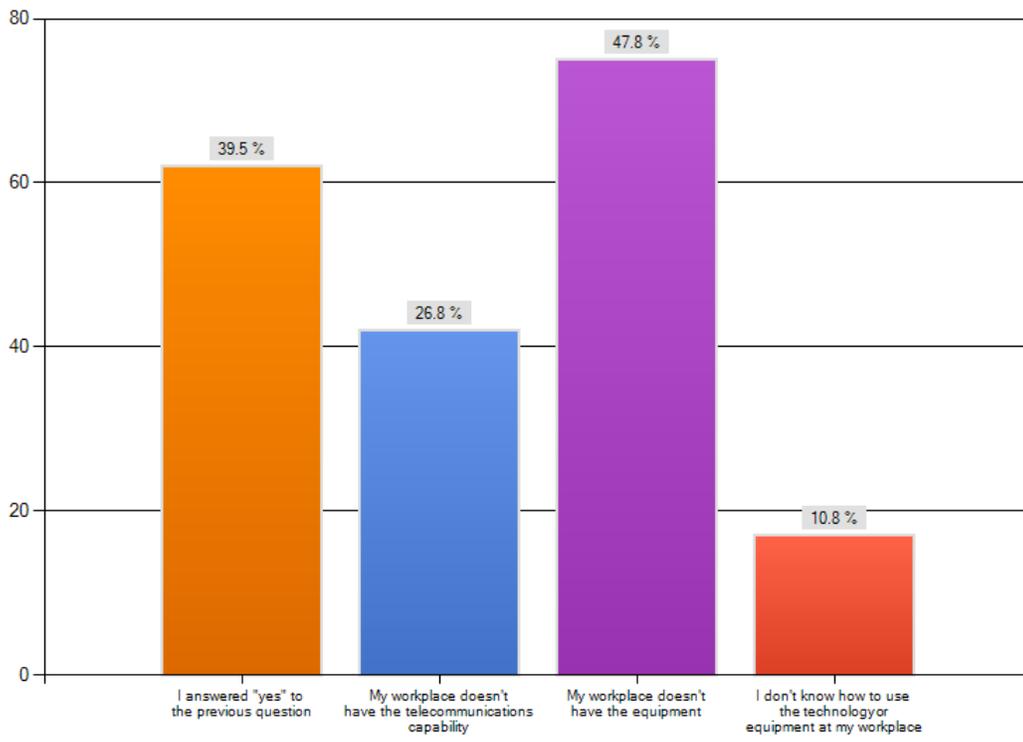
Respondents indicated that most use telephone conferencing (73%) and web conferencing (67%). Video conferencing is less common, with only 32% of respondents able to use this training mode.

For those respondents who cannot use these modes, the reasons are:

- The respondents' workplaces do not have the telecommunications capability (27%) or equipment (48%)
- The respondent does not know how to use the technology (11%).

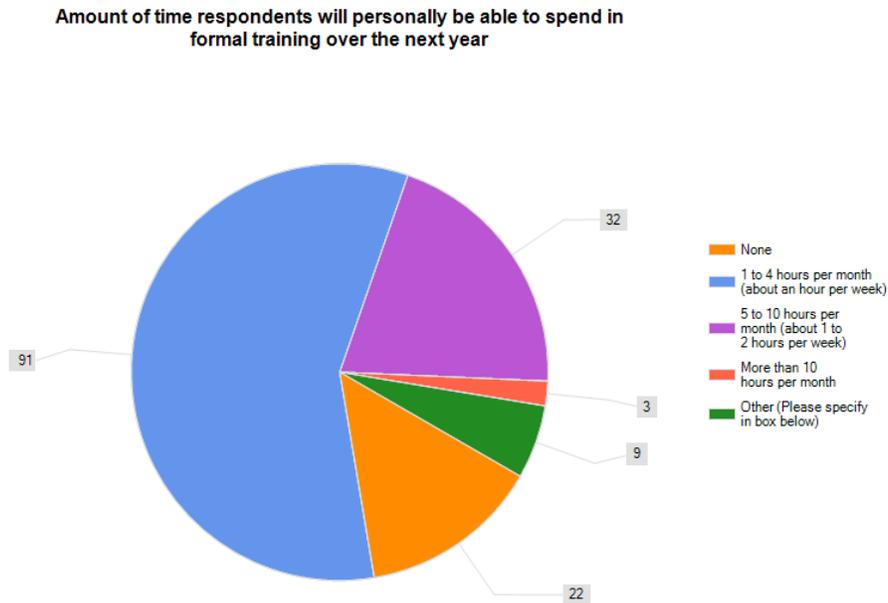


Workplace Capability



Time for Training

The majority of respondents (58%) expect to spend 1-4 hours per month in training. About 20% expect to be able to spend 5-10 hours per month in training over the next year. About 6% said they would be able to spend less than 1 hour per week, on average, over the next year.

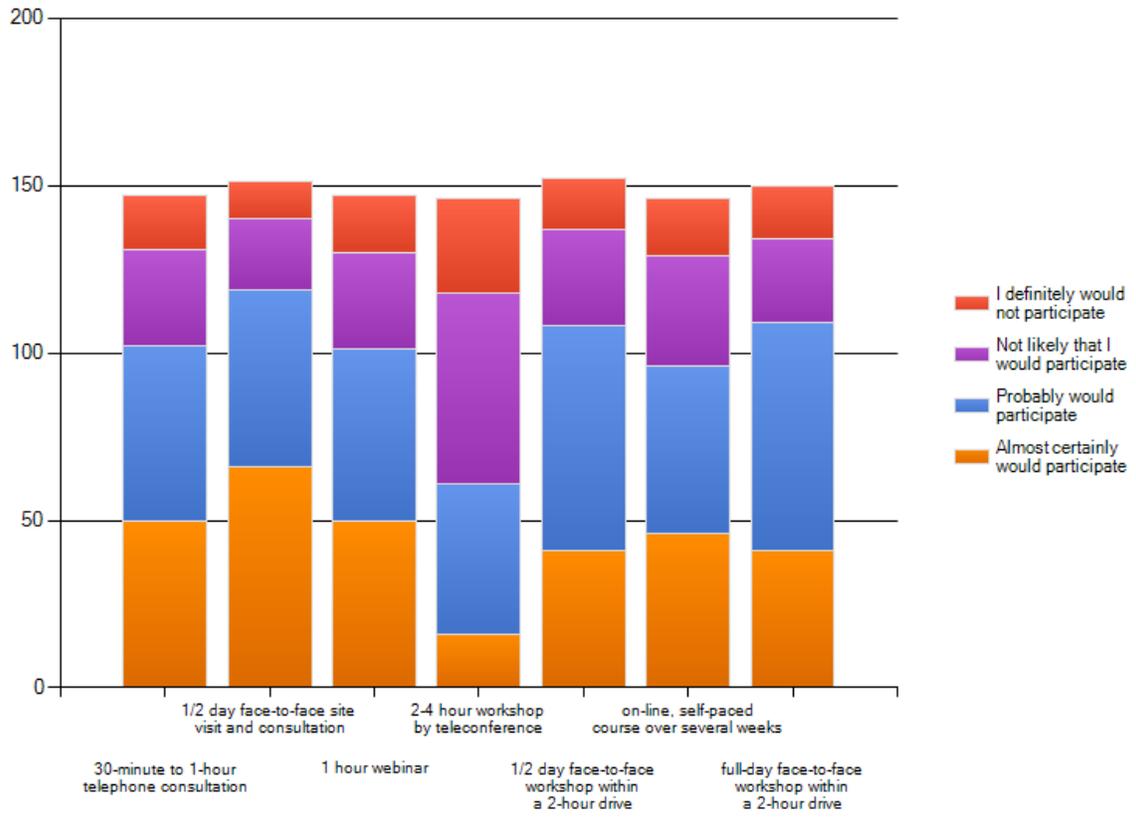


Training Mode Preferences

Provided that the training meets the respondents' needs, the mode of delivery most likely to be attended is a half-day, face-to-face site visit and consultation (62%). Following this in order by percentage of those who almost certainly would or probably would attend:

- A full-day (57%) or a half-day (56%) workshop within a 2-hour drive
- A 30 minute-to-one-hour telephone consultation (53.4%)
- A webinar (52.8%)
- A self-paced course over several weeks (50%)
- A 2-hour teleconference (31%).

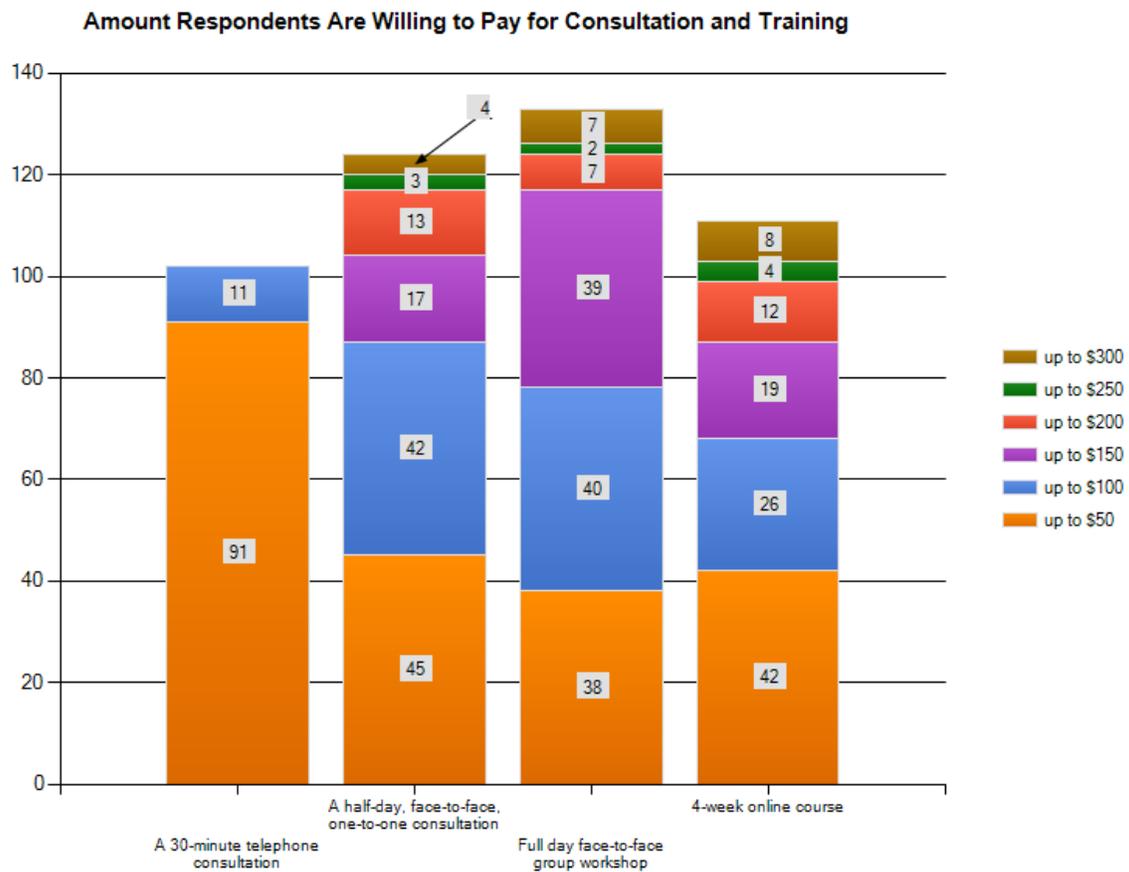
Training Mode Preferences



Willingness to Pay

Almost 87% of respondents are willing to pay for consultation and training, depending upon the cost. Those who indicated a willingness to pay for these modes indicated they would pay an amount in the following ranges:

- 30-minute telephone consultation, up to \$50 - \$100
- Half-day, face-to-face, on-site consultation, up to \$50 - \$300
- Full-day, face-to-face group workshop, up to \$50 - \$300
- Four-week online course, up to \$50 - \$300

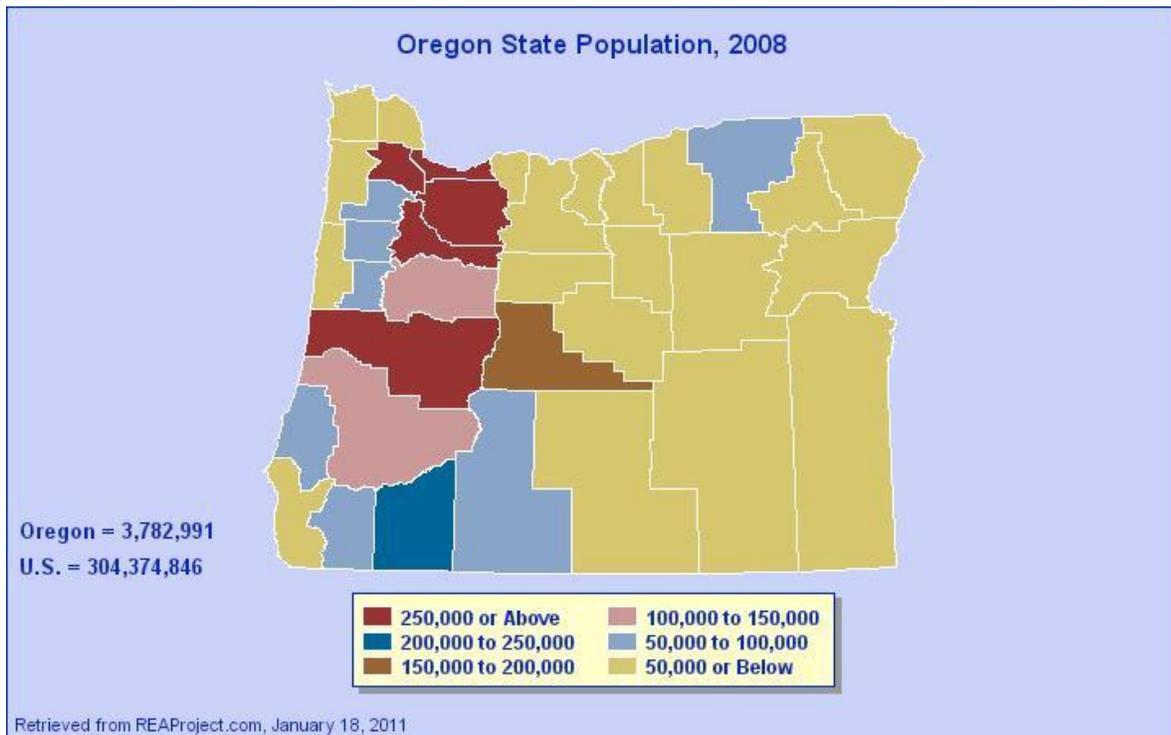


Conclusions and Next Steps

A plan to address the preservation needs of Oregon's archives, libraries, and museums should focus on a structure and funding to 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 plan must take into account the population dichotomy of Oregon and the inherent difficulties posed by distance and disproportionate resources. The plan must address how sustainable funding will be procured and who will be responsible for establishing and sustaining the structure, funding, and products of the Plan.



Oregon's land and water mass makes it the ninth largest U.S. state, covering 98,381 square miles. With 39.85 inhabitants per square mile, Oregon is ranked 39th from the top in population density in the U.S. Twenty of its 36 counties have populations well under 50,000. Appendix A is a map of Oregon counties showing their populations. The map also includes Interstates 5

and 84, the main north to south and west to east transportation thoroughfares. Metropolitan counties are highlighted.²

Oregon has large metropolitan areas as well as vast rural areas. Almost 78% of Oregon's 3.8 million inhabitants live in metro areas, much of it concentrated in the Willamette Valley which stretches from Eugene in the south through Corvallis and Salem to Portland. Population growth in the last few decades has been disproportionately larger in metropolitan Oregon. The distances from rural to urban areas can take the better part of a day or more. Computer technology and skills are more ubiquitous in the metropolitan counties than in the rural counties.

The C2C Steering Committee has concluded that the planning and collaborative grant development includes these elements:

- A coordinated, sustainable, and dynamic virtual resource for staff and volunteers to find specific information, consulting, training, and mentoring for the purposes of preserving Oregon's heritage collections.
- Placement of computer technology particularly in the rural areas of the state where this technology is absent.
- Face-to-face technical assistance to install computers and to train largely volunteer staff to use the computers and the virtual resource.
- Network support for learning and sharing resources statewide and regionally.
- A governance structure and collaborative funding plan to implement and sustain an Oregon Heritage Preservation collaborative.

Leaders' Summit: Action Report

On March 7, 2011, leaders from Oregon's archival, library, and museum organizations and agencies assembled to review this report and to take action. The assemblage determined that the C2C Steering Committee should focus its efforts on the establishment of an on-going structure for planning and funding preservation in Oregon.

Toward that end, the C2C Committee was directed to ask the Oregon Heritage Commission to appoint a cross-disciplinary (Archives, Libraries, Museums) preservation advisory board. The purpose of the advisory board would be to collaboratively plan and strategize on funding initiatives for preserving Oregon's heritage collections. The advisory body would be made up of

² Remarks in this report about metro and non-metro counties are in reference to the Oregon Regional Economic Analysis Project. This is a joint project of the *Rural Studies Program*, Oregon State University in partnership with the *Institute of Metropolitan Studies*, Portland State University. Metro and non-metro counties are defined by a combination of principal indicators such as population, per capita income, employment, total personal income, industry earnings, average earnings per job, and so forth. Oregon's 11 metro counties are: Columbia, Washington, Yamhill, Polk, Benton, Lane, Multnomah, Clackamas, Marion, Deschutes, and Jackson.
<http://oregon.reaproject.org/analysis/comparative-trends-analysis/>

the representatives of professional organizations such as the Oregon Museums Association, the Oregon Library Association, the Northwest Archivists Association, and agencies such as the Oregon State Archives, the Oregon State Library, the Oregon Historical Society, and so forth.

The suggested initial planning agenda:

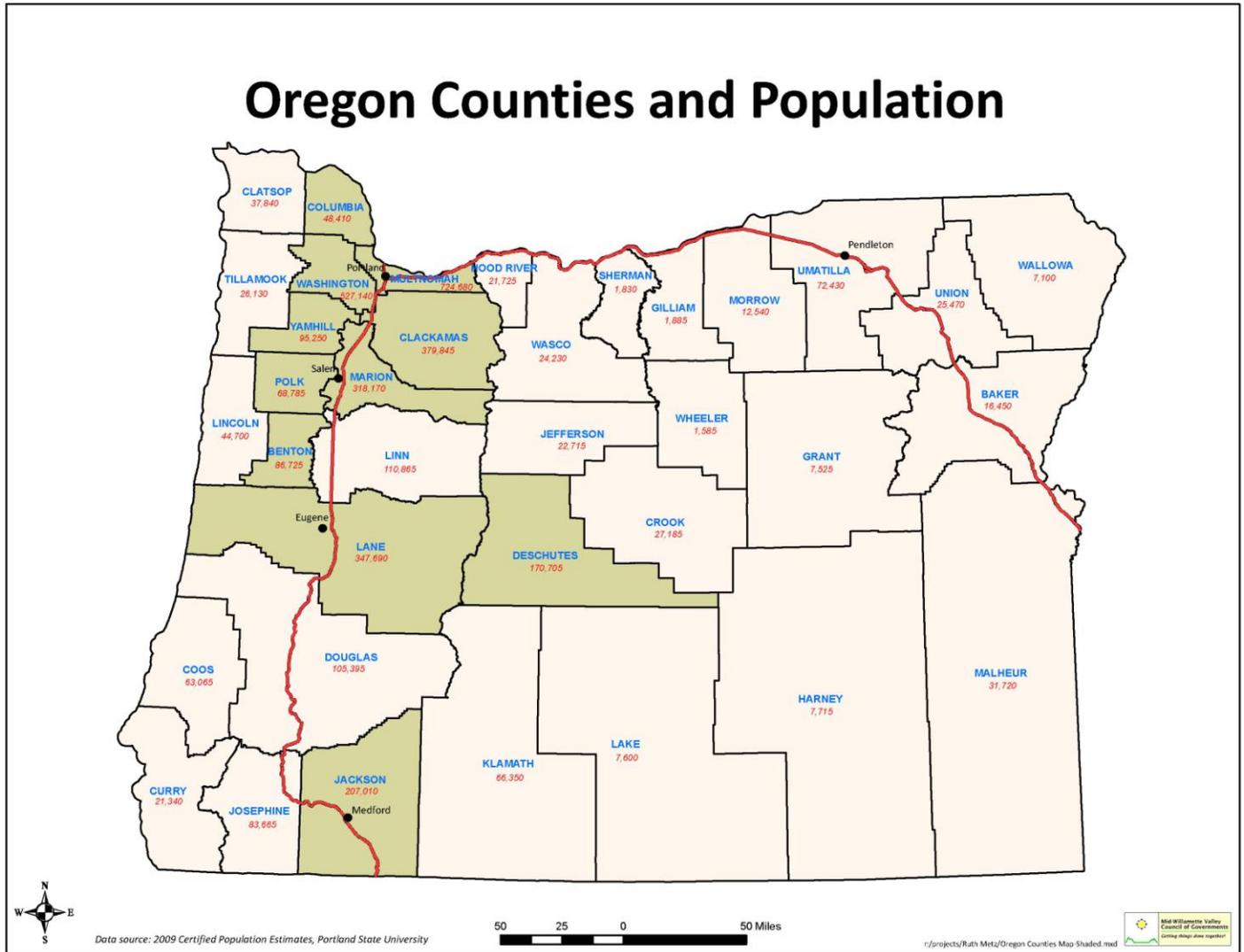
- A. Develop a plan for requesting grants and other funds to implement the committee's recommendations
- B. Conduct a statewide Inventory of critical objects and collections to ensure they are given attention.
- C. Submit an IMLS Implementation grant (\$50-250K) to carry the preservation agenda forward.

The C2C Steering Committee further directed that the proposal to the Oregon Heritage Commission should also include the other elements that the Committee found to be essential for preservation planning. These elements, repeated from page 41 are:

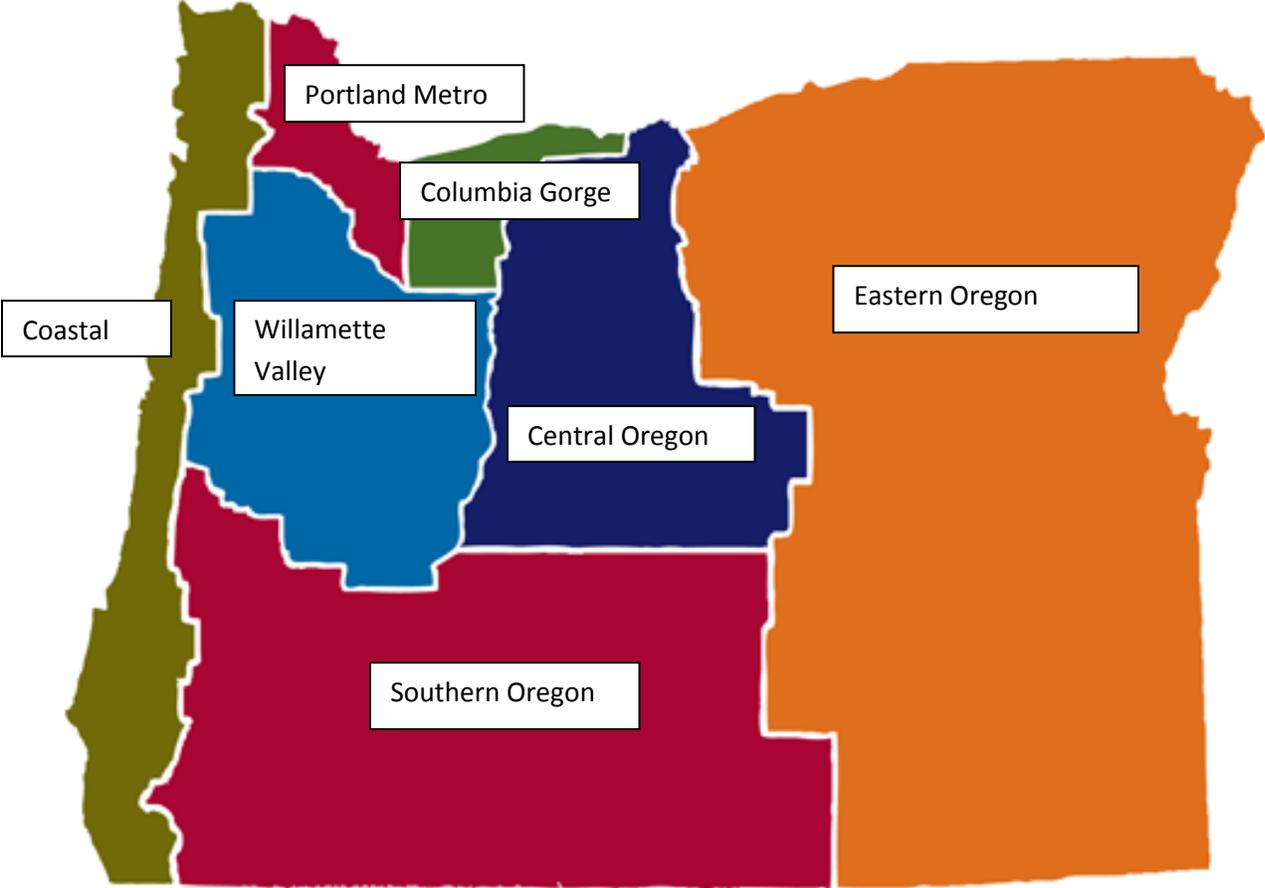
- A coordinated, sustainable, and dynamic virtual resource for staff and volunteers to find specific information, consulting, training, and mentoring for the purposes of preserving Oregon's heritage collections.
- Placement of computer technology particularly in the rural areas of the state where this technology is absent.
- Face-to-face technical assistance to install computers and to train largely volunteer staff to use the computers and the virtual resource.
- Network support for learning and sharing resources statewide and regionally.

C2C Project Director, Kyle Jansson and Project Coordinator, Ruth Metz presented this report to the Oregon Heritage Commission on April 7th, including an informal request to establish an Oregon preservation advisory body. The Commission invited a formal proposal for its July 18, 2011 meeting at Timberline Lodge. The C2C Steering Committee will develop a formal proposal for presentation at that time.

Appendix A: Oregon Counties and Population



Appendix B: Oregon Regions



Appendix C: Preservation Education Resources

Prepared by Shawna Gandy, MJ Koreiva, and Terry Baxter, C2C Steering Committee members

Fee-based Training

American Association of Museums

Live and on-demand webinars, face-to-face seminars and workshops, Podcasts

<http://www.aam-us.org/getinvolved/learn/index.cfm>

American Association for State and Local History

<http://www.aaslh.org/workshop.htm>

online and onsite workshops offered throughout the US

Workshops include: Basics of Archives, Collections Management and Practices, Collections Camp series

Assistance: Workshop Scholarships for New Professionals, Workshop Diversity Fellowships

American Institute for Conservation of Historic and Artistic Works

<http://www.conservation-us.org/>

Workshops, online courses, preconference workshops

Current offerings include: Disaster recovery & Emergency response, Conservation Assessments, Environment, Caring for / Digitizing photographs,

American Library Association – Online Learning

<http://www.ala.org/ala/onlinelearning/index.cfm>

Offerings include: Collection management, Preservation, Disaster Preparedness

Amigos Library Services, Dallas, TX

<http://amigos.org/node/218>

face-to-face, online, and self-paced workshops

Pertinent Categories: Cataloging, Digital Imaging, Preservation, Preservation Program Management, Technology

ARMA International

<https://www.arma.org/>

<http://www.armagreatnorthwest.org/> (Great Northwest Region)

<http://www.oregonarma.org/> (Oregon Chapter)

Online Courses

Web Seminars, On-demand Training, Preconference Workshops, Online Library

Balboa Art Conservation Center, San Diego, CA

http://www.bacc.org/ed_wkshop.htm

Onsite workshops, Preconference workshops, Institution-based training by arrangement.

Topics include: Collections Care (paintings, paper-based, photographs, audiovisual), Digitization, Environment, Needs Assessments, Emergency Preparedness, Planning & Fundraising, Handling & Housekeeping, Storage, Insurance, Pest control

Center for Conservation of Art and Historic Artifacts, Philadelphia, PA

www.ccaha.org

Onsite Workshops offered locally by arrangement

Current topics: Environment; Emergency Preparedness, Response, and Recovery; Preservation of books, paper documents, photographs, oversize items; Mold

Image Permanence Institute, Rochester, NY

http://www.imagepermanenceinstitute.org/shtml_sub/education.asp

No current offerings

Lyrasis, Atlanta, GA

<http://www.lyrasis.org/Classes-and-Events.aspx>

Face-to-Face, plus Live Online and On Demand Distance Education; Courses offered in Training Tracks (eg: Basic Archive Preservation Track, Basic Library Preservation Track)

Wide array of workshops on topics including: Cataloging & Metadata, Digital Services, Preservation, Technology

Quantity discount for Live-Online and On-Demand courses

National Association of Government Archivists and Records Administrators

<http://www.nagara.org/index.cfm>

Preconference workshops

Resource library for members

Northeast Document Conservation Center, Andover, MA

<http://www.nedcc.org/education/introduction.php>

Face-to-Face workshops (available locally by arrangement), Live Online Webinars

Wide array of workshops on topics including: Preservation Management, Collection Specific Classes, Emergency Preparedness, Digitization & Reformatting

Preservation 101 (Facilitated Version): Live online, comprehensive course, offered annually, limited to 24 participants

OCLC

<http://training.oclc.org/training>

Live-online webinars; Face-to-Face; Self-paced Web tutorials & demonstrations

(Training also offered by regional providers)

Cataloging & Metadata, Digital Collection Management

Society of American Archivists

<http://www.archivists.org/menu.asp?m=education>

Face-to-face and Web Seminars (many available on demand)

Collection management, Preservation, Emergency Management, Exhibitions, Digitization & Electronic Records

Western Archives Institute

<http://www.sos.ca.gov/archives/wai/>

An intensive, two-week program that provides integrated instruction in basic archival practices. Offered annually; current location: Berkeley, California.

Preconference Workshops

Northwest Archivists

<http://northwestarchivistsinc.wildapricot.org/>

Oregon Chapter, ARMA International

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

Oregon Heritage Conference

<http://www.oregon.gov/OPRD/HCD/OHC/Conference.shtml>

Oregon Library Association

<http://web.memberclicks.com/mc/page.do?sitePageId=31596&orgId=ola>

Oregon Museums Association

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

Free Training Workshops

Northeast Document Conservation Center -- Preservation 101 (Un-facilitated Version):

<http://unfacilitated.preservation101.org/loggedin.asp>

Oregon SHRAB Basics of Archives / Basics of Records Management series (offered in 2010)

http://arcweb.sos.state.or.us/shrab/workshops_2010.htm

WESTPAS training workshops in emergency preparedness, Face-to-Face, offered throughout Western States and Territories

www.westpas.org

Free Online Resources

A Race Against Time: Preserving AV Media (video and links to associated resources), Center for Art and Historic Artifacts

<http://www.ccaha.org/education/videos>

ALA Learning Wiki (resource for trainers), American Library Association

<http://alallearning.wetpaint.com/>

American Library Association Preservation & Reformatting Section

<http://www.ala.org/ala/mgrps/divs/alcts/mgrps/pars/index.cfm>

Association of Moving Image Archivists (more available to members only)

<http://www.amianet.org/resources/guidelinesnologin.php?accesscheck=%2Fresources%2Fguidelines.php>

Association for Recorded Sound Collections (ARSC) Technical Committee Publications

<http://www.arsc-audio.org/technical-committee.html>

Association of Research Libraries

<http://www.arl.org/preserv/>

Benson Ford Research Center, Caring for Your Artifacts

<http://www.thehenryford.org/research/caring.aspx>

CalPreservation.org Information Resources

<http://www.calpreservation.org/info/index.html>

Caring for Your Collections, Library of Congress Preservation Section

<http://www.loc.gov/preserv/careothr.html>

Collections Stewardship (AAM members only), American Association of Museums

www.aam-us.org

Connecting to Collections Guide to Online Resources, IMLS

<http://www.imls.gov/collections/resources/index.htm>

Connecting to Collections Webinar Series

<http://learningtimesevents.org/c2c/>

Conservation Kitchen, Washington State Library (online videos and handouts)

http://www.sos.wa.gov/library/conservation_kitchen.aspx

Conservation Wiki, American Institute for Conservation

http://www.conservation-wiki.com/index.php?title=Main_Page

Conserve O Grams, National Park Service

http://www.nps.gov/history/museum/publications/conservoogram/cons_toc.html

A Consumer Guide for the Recovery of Water-Damaged Traditional and Digital Prints, Image Permanence Institute

<http://www.archivaladvisor.com/shtml/waterdamage.pdf>

CoOL – Conservation Online

<http://cool.conservation-us.org/>

Council on Library and Information Resources (CLIR) publications

<http://clir.org/pubs/pubs.html>

Digital Preservation Management: Implementing Short-Term Strategies for Long-Term Projects, Cornell University Library

<http://www.icpsr.umich.edu/dpm/>

The Film Preservation Guide: The Basics for Archives, Libraries, and Museums. National Film Preservation Foundation

<http://www.filmpreservation.org/preservation-basics/the-film-preservation-guide>

Getting Ready in Indian Country: Emergency Preparedness and Response for Native American Cultural Resources, Heritage Preservation

<http://www.heritagepreservation.org/gettingready/>

Graphics Atlas (identification of photographs), Image Permanence Institute

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

Heritage Programs Division, Oregon Parks and Recreation Department

<http://www.oregon.gov/OPRD/HCD/Bulletins.shtml>

Library Preservation and Conservation Tutorial

<http://www.library.cornell.edu/preservation/librarypreservation/meolda/index.html>

Lyrasis Preservation Leaflets

<http://www.lyrasis.org/Preservation/Resources-and-Publications.aspx?ViewAll=1&tab=3>

Music Preservation Resources, Music Library Association

<http://committees.musiclibraryassoc.org/Preservation/HomePage>

OLA Quarterly, Winter 2008, Emergency and Disaster Preparedness and Response

http://data.memberclicks.com/site/ola/olaq_14no4.pdf

Oregon Guide to Emergency Preparedness Resources, 2008, Balboa Art Conservation Center

http://www.bacc.org/pdfs/OREmergencyGuide_0408.pdf

The Permanence and Care of Color Photographs: Traditional and Digital Color Prints, Color Negatives, Slides, and Motion Pictures by Henry Wilhelm

http://www.wilhelm-research.com/book_toc.html

Preservation Advisory Service Booklets, British Library

<http://www.bl.uk/blpac/publicationsleaf.html>

Preservation Leaflets; DPlan, Northeast Document Conservation Center

www.nedcc.org

Preservation Web Resources, University of Washington Libraries, Preservation Section

<http://www.lib.washington.edu/preservation/webresources.html>

Primer on Disaster Preparedness, Management & Response, National Parks Service

<http://www.nps.gov/history/museum/publications/primer/primintro.html>

Protecting Library and Archive Collections: Disaster Preparedness, Response & Recovery
(archived WESTPAS workshop)

<http://rurallibraries.org/workshop/05-04-2009/>

Saving Your Treasures, Nebraska State Historical Society, Gerald Ford Conservation Center

<http://www.netnebraska.org/extras/treasures/>

Smithsonian Museum Conservation Institute, Taking Care

http://www.si.edu/MCI/english/learn_more/taking_care/index.html

Other Resources

[Assessing Preservation Needs: A Self Study Guide](#), NEDCC

Companion DVD, "Preservation Survey, The: A First Step in Saving Your Collections"
available from Amigos,

http://www.amigos.org/learning/catalog/shopping/product_details.php?id=120

Websites & Listservs Posting Continuing Education Opportunities

Heritage Preservation – Preservation Calendar

<http://heritagepreservation.org/calendar.HTM>

Northwest Central

www.nwcentral.org

Oregon Museums Association

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

PreserveNW listserv

<http://www.lib.washington.edu/Preservation/preservenw.html>

Regional Alliance for Preservation

<http://www.rap-arcc.org/>

WebJunction

<http://www.webjunction.org/catalog>

Scholarships

American Association of Museums Fellowships

<http://www.aam-us.org/getinvolved/nominate/fellowships.cfm>

American Association for State & Local History

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

American Library Association

<http://www.ala.org/ala/mgrps/rts/nmrt/initiatives/applyforfunds/applyfunds.cfm>

Northwest Archivists

<http://northwestarchivistsinc.wildapricot.org/>

Society of American Archivists

<http://www2.archivists.org/recognition>

Mentoring

American Association of Museums

<http://www.aam-us.org/mentoring.cfm>

American Association for State & Local History

<http://aaslh.org/mentor.htm>

American Library Association

<http://www.ala.org/ala/mgrps/rts/nmrt/oversightgroups/comm/mentor/mentoringcommittee.cfm>

Society of American Archivists

<http://www2.archivists.org/membership/mentoring>

Southern Oregon Historical Society, Medford

Through a contract with the Oregon Heritage Commission and the State Historic Preservation Office and made possible by donations to the Oregon Cultural Trust, SOHS offers free consultation and preservation education to museums, libraries and archives in Jackson and Josephine counties. **Contact** director@sohs.org

Tamástslikt Cultural Institute, Pendleton

Through a contract with the Oregon Heritage Commission and the State Historic Preservation Office and made possible by donations to the Oregon Cultural Trust, Tamástslikt offers free consultation and preservation education to museums, libraries and archives in Northeast Oregon. **Contact** john.chess@tamastsligt.org

Appendix D: Preservation Funding Sources

Prepared by Shawna Gandy and MJ Koreiva, C2C Steering Committee Members

Institute for Museum and Library Services

Conservation Assessment Program

<http://www.ims.gov/applicants/grants/conservAssessment.shtm>

<http://www.heritagepreservation.org/CAP/>

Funds a general conservation assessment of all of the museum's collections as well as its environmental conditions and policies and procedures relating to collections care. The program supports a two-day site visit by a conservation professional or preservation architect to perform the assessment and three days writing a report. The report can help your museum develop strategies for improved collections care and provide a tool for long-range planning and fund-raising.

Museum Assessment Program – Collections Stewardship/Collections Management Assessment

<http://www.aam-us.org/museumresources/map/cmap.cfm>

Collections Stewardship Assessment focuses on collections policies, planning, access and documentation within the context of the museum's total operations. The scope of the assessment includes collections care and use, acquisitions and deaccessioning, legal, ethical, and safety issues, documentation, inventory, and emergency planning.

Conservation Project Support (up to \$150,000; 1:1 match)

<http://www.ims.gov/applicants/grants/conservProject.shtm>

Grants are available to museums for many types of conservation activities, including surveys (general, detailed condition, or environmental); training; treatment; and environmental improvements. Funds conservation care, not collection management or maintenance (see Museums for America).

Museums for America (\$5,000–\$150,000; 1:1 match)

<http://www.ims.gov/applicants/grants/forAmerica.shtm>

The goal of MFA is to strengthen the ability of a museum to serve the public more effectively by supporting high-priority activities that advance the institution's mission and strategic goals. Applicants can apply for projects in one of the following three categories:

- *Engaging Communities (Education, Exhibitions, and Interpretation)*
- *Building Institutional Capacity (Management, Policy, and Training)*
- *Collections Stewardship (Management of Collections)*

Collections stewardship can include: Collections planning, Collections security and safety, Database development/enhancements, Digitization of collections, Registration/cataloguing, Research/documentation, Risk assessment

American Heritage Preservation Grants (up to \$3000)

http://www.ims.gov/applicants/guidelines/ahpg_index.shtm

To raise awareness and fund preservation of treasures held in small and mid-sized museums, libraries and archives that convey the essential character and experience of the United States. Priority is given to smaller institutions.

Funds are aimed at completing a stand-alone conservation project, to preserve specific items, including works of art, rare books, scientific specimens and historical documents (photographs, maps, deeds, etc.). Applicants will build on completed conservation assessments of their collections.

21st Century Museum Professionals Program (\$15,000 to \$500,000; 1:1 cost share)

http://www.ims.gov/applicants/guidelines/21mp_index.shtm

Grants are intended to reach broad groups of museum professionals throughout a city, county, state, region, or the nation and increase their capacity to serve their audiences. These projects should reach multiple institutions and diverse audiences.

Funding will support projects in the full range of museum operations, involving core management skills such as planning, leadership, finance, program design, partnership, and evaluation. Also includes collections care and management, interpretation, marketing and audience development, visitor services, governance, use of technology, and other areas of museum operations. Proposals may also focus on projects that help museums attract and retain staff, and improve the capacity of museums to address the rapid changes facing many communities.

Connecting to Collections Statewide Implementation Grants (\$50,000-250,000; cost sharing of up to one-third from non-federal sources encouraged but not required)

<http://www.ims.gov/collections/grants/implementation.htm>

Grants to implement the plans or models created with the Statewide Planning grants, addressing issues identified in the Heritage Health Index. These grants are designed to encourage people and institutions in each state to cooperate on a plan that will benefit all. Project activities should accommodate needs of institutions in each state; they do not need to address all four recommendations. Each state should indicate its most pressing needs, report what has already been done, name the organizations and people to be involved in the planning process, and outline specific next steps.

Museum Grants for African American History and Culture (\$5000-150,000)

<http://www.ims.gov/applicants/grants/AfricanAmerican.shtm>

Funds professional development, technical assistance, internships, outside expertise, and other tools to enhance institutional capacity and sustainability.

Native American Library Services Basic & Enhancement Grants (non-competitive, distributed in equal amounts)

<http://www.ims.gov/applicants/grants/nativeAmerican.shtm>

Basic grants support existing library operations and maintaining core library services. Education/Assessment Option provides funding for library staff to attend continuing education courses and training workshops on- or off-site, for library staff to attend or give presentations at conferences related to library services, and to hire a consultant for an on-site professional library assessment.

<http://www.ims.gov/applicants/grants/nativeEnhance.shtm>

Enhancement Grant projects may enhance existing library services or implement new library services, including partnerships with and coordination between other libraries, agencies, and community-based organizations.

Native American/Native Hawaiian Museum Services Grant (\$5000-50,000; cost sharing encouraged but not required)

<http://www.ims.gov/applicants/grants/nativeServices.shtm>

Supports programming, professional development, and enhancement of museum services. Activities supported include collections care & management, disaster preparedness and risk management, technology, and a broad range of professional development opportunities.

National Endowment for the Arts

Grants for Arts Projects: Arts Works: Design: Engagement (\$10,000 to 100,000 – most less than \$25,000; minimum 1:1 match required)

<http://nea.gov/grants/apply/GAP12/DesignAW.html>

Most grants fund the creation of works of art and arts education, but this grant will also fund the documentation, preservation, and conservation of art work. Organizations with operating budgets less than \$50,000, however, are encouraged to look to local or state sources rather than the NEA.

National Endowment for the Humanities

Preservation Assistance Grants (up to \$6000)

<http://neh.gov/grants/guidelines/pag.html>

Funds consultation for preservation assessments and conservation, storage furniture and preservation supplies, environmental monitoring equipment, education and training, for significant humanities collections in small to medium sized institutions.

Preservation and Access Education and Training (\$50,000-250,000 for field services; up to \$125,000 per year for other projects; 20% match recommended)

<http://www.neh.gov/grants/guidelines/pet.html>

Funds regional collections preservation field services, master's degree programs in preservation and conservation, and workshops that address preservation and access topics of national significance and broad impact.

Humanities Collections and Reference Resources Grants (up to \$350,000; 1:2 to 1:1 match recommended)

<http://neh.gov/grants/guidelines/HCRR.html>

Supports projects that provide an essential foundation for scholarship, education, and public programming in the humanities, including projects to preserve and create access to humanities materials. (ie: cataloging, reformatting, conservation, etc.) Applications may address the holdings or activities of a single institution or may involve collaboration. In all cases, projects should be designed to facilitate sharing, exchange, and interoperability of humanities information and products.

Sustaining Cultural Heritage Collections (up to \$40,000 for planning, usually with 20% match; up to \$400,000 for implementation, usually with 50% match)

<http://neh.gov/grants/guidelines/SCHC.html>

Funds planning and implementation of preventative preservation measures that mitigate deterioration and prolong the useful life of collections, including managing relative humidity, temperature, light and pollutants in collection spaces; providing protective storage enclosures and systems for collections; and safeguarding collections from theft and from natural and man-made disasters.

Challenge Grants (\$30,000-500,000+; 3:1 or 2:1 match)

<http://www.neh.gov/grants/guidelines/challenge.html>

Capacity-building grants, intended to help institutions and organizations secure long-term improvements in and support for their humanities programs and resources. Grants may be used to establish or enhance endowments or spend-down funds that generate expendable earnings to support ongoing program activities, including preservation, staffing, consultants, and training. Grantees may also use funds for one-time capital expenditures (such as construction and renovation, purchase of equipment, and acquisitions) that bring long-term benefits to the institution and to the humanities more broadly. Funds collaborative projects as well as those benefitting single organizations.

National Historic Publications & Records Commission

Archives – Basic Processing (up to \$200,000; minimum 1:1 cost share)

<http://www.archives.gov/nhprc/announcement/basic.html>

Funds basic processing (catalog records & EAD finding aids), preservation planning, collections development, and establishing new archives. Plans to address processing backlogs must be outlined in proposal. Professional development as it relates to the project is encouraged and funded.

Archives – Detailed Processing (up to \$200,000; minimum 1:1 cost share)

<http://www.archives.gov/nhprc/announcement/detailed.html>

Funds detailed processing (series & file level description added to online catalog records and EAD finding aids) and preservation of collections of national significance. The collections also should have high research demand or substantial preservation challenges. Repositories must have virtually all of their collections processed sufficiently so that researchers can find them through online searches, and they must have procedures in place to prevent the creation of new backlogs.

Digitizing Historical Records (up to \$150,000; minimum 1:1 cost share)

<http://www.archives.gov/nhprc/announcement/digitizing.html>

Funds cost-effective methods to digitize nationally significant historical record collections and make the digital versions freely available online. Projects must make use of existing holdings of historical repositories and consist of entire collections or series. The materials should already be available to the public at the archives and described so that projects can re-use existing information to serve as metadata for the digitized collection.

Electronic Records Projects (up to \$300,000; minimum 1:1 cost share)

<http://www.archives.gov/nhprc/announcement/electronic.html>

Funds projects that will increase the capacity of archival repositories to create electronic records archives that preserve records of enduring historical value. The NHPRC supports efforts by archivists and records managers to meet the challenges of electronic records. Projects must involve institutions that have already established archives and records management programs. Both start-up and collaborative projects will be funded. Inclusion of a professional development component encouraged.

Professional Development Grants for Archives & Historical Publishing (up to \$150,000; minimum 1:1 cost share)

<http://www.archives.gov/nhprc/announcement/development.html>

Funds professional education curriculum development, basic and advanced institutes, or research seminars. Surveys, focus groups, and other activities to understand these professions and their educational and training needs are also eligible. In general, projects should anticipate results that will affect individuals in more than a single state. If your project is focused only on a single state, the proposal narrative must explain why the State Historical Records Advisory Board in your state cannot manage the proposed project.

National Park Service

Save America's Treasures (\$25,000-700,000; 1:1 match)

<http://www.nps.gov/history/hps/treasures/>

Grants to federal, state, local, and tribal government entities, and non-profit organizations for preservation and/or conservation work on nationally significant intellectual and cultural artifacts and nationally significant historic structures and sites. Does not fund collections management. (National significance must be established. Underfunded in the West.)

State Grants: Oregon

Oregon Cultural Trust - Competitive Grant Program (\$5000-50,000; 1:1 match)

http://www.culturaltrust.org/programs/grant_opportunities.php

Funds access and preservation of Oregon's cultural resources, as well as building capacity of cultural organizations.

The Oregon Cultural Trust also funds 45 Regional Cultural Coalitions (36 counties and federally recognized tribes) issuing local grants:

<http://coalitions.culturaltrust.org/>

For example, in the Portland Metro area, Regional Arts & Culture Council

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

Oregon Heritage Commission –

Oregon Heritage Grants (generally \$20,000 or less; 1:1 match)

<http://www.oregon.gov/OPRD/HCD/OHC/heritagegrants.shtml>

Funds projects to conserve, develop, or interpret Oregon's heritage.

Museum Grants (generally \$10,000 or less; match recommended)

<http://www.oregon.gov/OPRD/HCD/OHC/museum.shtml>

Private Funding

The following list is derived from <http://www.loc.gov/preserv/foundtn-grants.pdf> ; see also <http://foundationcenter.org/>

More Oregon foundations (1633 in all!) may be found in the *Oregon Foundation DataBook and CD* and at <http://www.foundationdatabook.com/Pages/or/orlinks.html>

Oregon Foundations

The Benton County Foundation

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

Community grants for non-profit organizations within Benton County.

The Carpenter Foundation (recent grants \$1000-25,000)

<http://www.carpenter-foundation.org/grants.html>

Funds education, the arts and other activities in Jackson and Josephine Counties.

The Collins Foundation (recent grants \$10,000-650,000)

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

Funding available under both education and humanities categories.

The Coquille Tribal Community Fund

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

The Coquille Indian Tribe established this fund in order to share profits from The Mill Casino Hotel with the residents of southwestern Oregon through grants made to eligible organizations. Areas funded include arts & culture, education, and historic preservation.

The Cow Creek Umpqua Indian Foundation

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

Grants to eligible non-profit organizations in communities in Douglas, Coos, Lane, Deschutes, Klamath, Jackson and Josephine counties. Areas funded include education, community support, and arts.

The Ford Family Foundation

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

Funds public charities predominantly benefiting communities in rural Oregon and Siskiyou County, California. Current applicable funding categories:

Public Convening Spaces – capital projects to enhance convening aspects of libraries, community and resource centers, etc. (\$50,000-250,000; up to one third of total cost)

Technical Assistance – for leadership development, organizational improvements, community collaborations (\$1000-5000; minimum 20% match required)

The Jeld-Wen Foundation

<http://www.jeld-wenfoundation.org/>

Primarily funds capital projects, which are defined by those proposals that involve building, renovating, updating, expanding or improving a facility, but will also fund services support, such as buying books. Areas funded include community, education, arts & humanities. Projects must be in locations with Jeld-Wen plants or business operations. Includes locations outside of Oregon.

Recently funded \$250,000 upgrade to facilities of Yakima Valley Museum in Yakima, WA.

The Kinsman Foundation

<http://kinsmanfoundation.org/guidelines/eligibility.htm>

Funds historic preservation, with limited funding to small arts, culture, and humanities organizations.

The Larson Legacy

<http://dynamodata.fdncenter.org/990s/990search/ffindershow.cgi?id=LARS035>

Giving primarily on an international basis, with some emphasis on India, as well as in the northwestern U.S., with a focus on CA, OR, and WA. No detailed information found.

Leo Adler Community Fund

<http://www.leoadler.com/community.html>

Funds charitable organizations benefiting Baker County. Areas funded include arts and humanities, education, social and historical welfare.

Small community grants, less than \$5000; Community grants, \$5000 or more.

Meyer Memorial Trust

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

Funds projects in Oregon and Clark County, WA. Strong supporter of cultural and heritage organizations. Has recently funded collections preservation and conservation.

Responsive Grants for activities including core operating support, strengthening organizations, building and renovating facilities. (\$50,000-250,000)

Grassroots Grants for smaller organizations (\$1000-25,000)

The James F. and Marion L. Miller Foundation (recent awards: \$2500-75,000)

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

Single or multi-year grants for projects that advance the arts or education, including libraries and museums, in Oregon.

The Oregon Community Foundation (recent awards: \$4000-\$54,000)

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

Community Grants include cultural and preservation activities. Recent awards for collection care facility and HVAC upgrades, as well as digitization and cataloging. New guidelines for the recession encourage streamlined operations and collaboration.

Spirit Mountain Community Fund

<http://www.thecommunityfund.com/>

Charitable foundation of The Confederated Tribes of Grand Ronde funding projects in Northwest Oregon in areas including arts & culture and education. General Purpose Grants funding up to \$5000 for small organizations and up to \$50,000 (program) or \$100,000 (capital) for large organizations. Also funds one Oregon Tribal Grant per year, up to \$75,000 and not more than 50% of total project budget.

The Stimson-Miller Foundation

<http://www.stimsonmillerfoundation.org>

Funds specific program support of cultural, educational, health and human services, and religious organizations located within a 60 mile radius of Stimson Lumber Company operations in either Manufacturing or Resource Management.

Ann & Bill Swindells Charitable Trust

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

Funds educational, cultural and scientific endeavors in Oregon (colleges and universities, arts, cultural, civic and social service organizations).

Trust Management Services (up to \$10,000)

<http://trustmanagementservices.net/>

Funds non-profit organizations throughout Oregon, by region. Six regions comprise the 36 counties in Oregon. Three regions are funded annually, each county is funded bi-annually (six grant deadlines over a two year period, each for a different set of counties). Be sure that funds will be available for your county when you intend to apply. Seeks applications emphasizing education, community service, cultural, youth activities and historical preservation.

The Wessinger Foundation

<http://www.gosw.org/sites/wessinger>

Areas funded include education and arts & culture, Strong preference for organizations serving Multnomah, Clackamas, and Washington Counties.

The Wildhorse Foundation

<http://www.wildhorseresort.com/footer/foundation.html>

Charitable foundation for the Wildhorse Resort & Casino and the Confederated Tribes of the Umatilla Indian Reservation. Funds education, the arts, cultural activities, and historic preservation, among other activities. Primarily funds projects that benefit the public within Umatilla, Union, Morrow and Wallowa Counties, or those proposed by any Native American Tribal government agency or Native American charitable organization with its principal office and base of operations within the State of Oregon or any national or regional Indian organization.

Non-Oregon Foundations

See <http://www.loc.gov/preserv/foundtn-grants.pdf> for lists of recent grants funded. Be aware that funding priorities may have changed since this list was issued. Foundations without web-verifiable information have been omitted.

CLIR (Andrew W. Mellon Foundation)

Cataloging Hidden Collections and Archives (\$75,000-500,000)

<http://www.clir.org/hiddencollections/index.html>

Cataloging and description of collections of any format by American libraries, museums, archives or other cultural heritage institutions that hold truly hidden collections of broad, scholarly import. Collaborative projects encouraged.

Bill & Melinda Gates Foundation

www.gatesfoundation.org

Funds public access to computers in public libraries – equipment, support, training.

The Andrew W. Mellon Foundation NY

www.mellon.org

Scholarly Communications & Information Technology and Museum & Art Conservation grants may fund preservation efforts and endowments for staffing.

National Film Preservation Foundation

Basic Preservation Grants (\$1000-10,000)

<http://www.filmpreservation.org/nfpf-grants/basic-preservation-grants>

Funds laboratory work to preserve culturally and historically significant film materials.

Matching Grants (\$18,000-50,000; 1:5 match)

<http://www.filmpreservation.org/nfpf-grants/matching-grants>

Funds complex, large-scale preservation, reconstruction, or restoration projects involving a single film or film collection of special cultural, historic, or artistic significance. The grants may be requested by nonprofit or public institutions with film preservation experience and the current capacity to carry out large preservation efforts.

Appendix E: Leaders' Summit Participants

Kyle Jansson, Oregon Heritage Commission and C2C Project Director
Jim Bunnelle, Oregon Library Association, Preservation Roundtable Co-Chair, Lewis and Clark College Library, Acquisitions and Collection Development
Rob Everett, Oregon Library Association President and Director, Springfield Public Library
Roger Roper, Deputy State Historic Preservation Officer and Assistant Director, Oregon Parks & Recreation Department.
Dave Hegeman, Business Reference Librarian, Special Collections Coordinator, Oregon State Library
Shawna Gandy, Collections Access Specialist, Oregon Historical Society Research Library
Gardner Chappell, Oregon Museums Association President and Douglas County Museum
Keni Sturgeon, Curator & Museum Director, Mission Mill Museum part of the Willamette Heritage Center
Kris Kern, Fine and Performing Arts Librarian, Portland State University Library
Layne G Sawyer, Oregon State Archives
Kelly LaChance, Education Director, Cow Creek Band of Umpqua Tribe of Indians
Kerry Tymchuck, Oregon Historical Society, Interim Director
Mary E Herkert, Oregon State Archives
MJ Koreiva, Oregon Museums Association and Umpqua River Lighthouse Museum
Normandy Helmer, University of Oregon Libraries
Judith Norton, Head, Access Services, Oregon Health & Science University Library
Tiah Edmunson-Morton, Archivist, Oregon State University
Jim Scheppke, State Librarian
Heather Bouchey, Curator, Washington County Museum
Ruth Metz, Project Coordinator

Appendix F: Learning Needs Identified in Needs Assessment

In addition to Disaster Preparedness:

Collection Care

1. Best practices for storage and handling by collection format
2. Choosing archival enclosures and boxes
3. Choosing storage furniture
4. Understanding environmental conditions and how to monitor them
5. Providing security for collections
6. Drafting and implementing a disaster response plan and team
7. Understanding and practicing collections salvage procedures
8. Understanding and choosing reformatting options (microfilm, digital, etc.)
9. Book binding options
10. Deacidification
11. Conducting a collections condition assessment
12. Choosing a conservator
13. Conducting a survey of facilities and collections for preservation needs
14. Setting preservation priorities
15. Drafting a preservation plan

Collection Management

16. How to say "no" to items that are not appropriate for our collection
17. How to organize collections
18. How to plan for and prioritize collections
19. Be able to write a collection development plan
20. Learn strategies for managing the backlog
21. Understand acquisitions and documentation procedures
22. Be able to catalog the collection
23. Know about cataloging options and trends and be able to apply them to my situation
24. Understand and use metadata

Advocacy

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

Technology Assistance

32. Be able to use a computer
33. Be able to trouble shoot computer hardware and do basic maintenance and repair
34. Be able to apply technology efficiently
35. Understand how to install and use WI-FI
36. Be able to evaluate software products
37. Understand applicable web trends
38. Be able to use social networking technology
39. Keep up with technology changes
40. Be able to resolve reformatting issues

Planning Needs

41. Planning and setting priorities with board and administration
42. Analyzing our organization for greater effectiveness
43. Thinking and planning strategically
44. Developing long-range preservation plans and setting priorities
45. Disaster response and recovery planning
46. Fund-development planning
47. Planning, prioritizing, implementing, and following through on a group work plan