



# Connecting to Collections

Preserving Washington's Cultural Heritage



## Final Consultant's Report to the Connecting to Collections Steering Committee

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# Connecting to Collections Partners

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Washington State Archives

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Yakama Nation Library



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## **Executive Summary**

The Washington Preservation Initiative, a collaborative project between the leading cultural heritage institutions in the state to preserve Washington's library, museum, and archival collections, has become a leading example of a statewide preservation program in the US. Through its provision of education, information, preservation site assessments, preservation grants, and through evaluation and feedback mechanisms used throughout its existence, the program has reached a wide variety of cultural heritage staff and enhanced their preservation knowledge and practices.

As one of the first group of states chosen to receive the Institute of Museum and Library Services' "Connecting to Collections" Statewide Preservation Planning Grants, Washington has taken the opportunity to expand and enhance its preservation strategy for the state.

By virtue of its previous survey and communications work, the WPI had a good idea of the preservation needs within the state. To craft its offerings into a sustainable preservation program, and meet new and additional needs within the state, the group went through a process in 2008-09 to hold an initial planning conference, engage Work Groups to develop specific plans, and held a second, more focused conference to review the work of the groups.

The results of the conference and the Work Group activities were the development of four statements of future work to be done by the WPI. Recommendations were made in the areas of Preservation Advocacy, Collaborative Disaster Planning, Building Sustainable Institutional Preservation Programs, and further development of a Sustainable Statewide Preservation Program.

This report contains information about the genesis and history of the Washington Preservation Initiative, the two conferences, and the activities of the Work Groups. More importantly, it includes a plan for the future organization, governance, and infrastructure of the group; potential funding sources; and methods to move forward disaster response and preservation planning across the cultural institutions of the state as widely as possible through a variety of programmatic activities, including enhanced training and outreach.

During the economic downturn of 2008-09, the risks to collections became more urgent as the competition for preservation funding became more difficult. By focusing on advocacy, disaster planning, and sustainability, the Washington Preservation Initiative makes a strong case to take a program which is a recognized leader in the nation, and make the program a model – a benchmark which other states strive to match.

## **Preface**

The collections of the archives, historical societies, libraries, and museums of Washington document our rich and diverse cultural heritage. They encompass artwork, books, ethnographic objects, film, photographs, manuscripts, maps, objects, scrapbooks, sound recordings, and many other formats. Collectively they provide in-depth resources for learning, teaching, research, personal development and study, and the economic and social well being of our citizens.

Preservation involves "activities associated with maintaining library, archival, or museum materials for use, either in their original physical form or in some other format" (American Library Association). It is "the protection of cultural property through activities that minimize chemical and physical deterioration and damage and that prevent loss of informational content. The primary goal of preservation is to prolong the existence of cultural property" (American Institute for Conservation of Art and Historic Artifacts).

The components of an institutional preservation program vary depending upon the size and nature of the institution, but at minimum include preservation planning, environmental control and proper storage,

staff and user education in care and handling, disaster planning, conservation, reformatting, and security (See Appendix 4 *Sustainable Statewide Preservation Programs Work Group*).

All Washingtonians bear a responsibility for preserving our cultural collections. During the past year cultural organizations in our State have worked together through the Connecting to Collections project (<http://www.secstate.wa.gov/library/libraries/c2c/>) to formulate a preservation plan that can help institutions preserve their collections. We share a vision of a state that recognizes the need and importance of preservation of our cultural collections and provides the resources to preserve its heritage.

## **Project Background**

Like most states in the western United States, Washington lacks a regional preservation organization that provides preservation information, training and conservation, and/or reformatting services to archives, libraries, museums, and historical societies in this region. During the past few years partnerships have helped to fill the void. These collaborations have enhanced collection stewardship in Washington and provided a context for this project. Preservation needs have been identified and some have been addressed. However, four main issues were seen as requiring serious exploration (see Preservation Needs on page 4).

In 1998, discussions began among the Regional Alliance for Preservation (RAP), a network of non-profit regional conservation/preservation organizations, about possible RAP outreach programs in the Pacific Northwest. Those discussions led to the Northeast Document Conservation Center (NEDCC) scheduling a national preservation conference, "School for Scanning," at the University of Washington Libraries in September 2000. Immediately following the School for Scanning, librarians and others in the Pacific Northwest interested in preservation met with members of RAP at the University of Washington (UW) for a conference, "Swimming Upstream: Cooperatively Preserving Collections in the Pacific Northwest." Information about this conference can be located at <http://www.lib.washington.edu/Preservation/swimmingupstream.html>.

Outcomes of this conference included:

1. A vision for preservation in the Pacific Northwest (<http://www.lib.washington.edu/Preservation/vision.html>);
2. A regional preservation email discussion list, Preservenw, hosted by the University of Washington (<http://www.lib.washington.edu/Preservation/preservenw.html>); and
3. Discussions with state libraries in the region about supporting preservation activities.

A proposal made to the Washington State Library (WSL) to utilize federal Library Services and Technology Act (LSTA) funds to support preservation of library collections resulted in the establishment of the Washington Preservation Initiative (WPI). The initiative's goal: "To help libraries safeguard Washington's cultural heritage." As a first step, WSL contracted with OCLC to develop a mail survey complemented by targeted telephone interviews. The survey, completed in 2004 and available for other states to use, can be found at <http://www.secstate.wa.gov/library/libraries/projects/presSurveySummary2004.pdf>.

The survey determined that, in most Washington libraries, preservation was a low priority with low funding levels and low preservation staffing levels. However, there was "a strong endorsement of the WPI as an instrument to change the level of preservation awareness and impact in the state of Washington." The survey identified the need for funding for preservation projects, for preservation training, and for individual library preservation site surveys to help identify and prioritize preservation needs.

Between 2003 and 2007, \$716,000 was allocated by the Washington State Library for the WPI. 77% of the allocated funding went to small preservation projects that included photograph negative duplication, microfilming, deacidification, environmental monitoring, and preservation assessments. An additional \$110,000 was targeted for 2008, bringing the total allocation to \$826,000 with 80% going toward small preservation projects.

In the past five years, 22 Washington libraries have had preservation assessments, most funded by WPI. The Institute of Museum and Library Services (IMLS), the federal agency that administers LSTA, has funded preservation assessment surveys in 52 Washington museums since 1990. WPI also sponsored 36 one-day training workshops on a wide range of preservation topics at no cost to over 900 registrants.

A 2006 survey on the impact of WPI found, "The level of satisfaction with the program is extremely high and the impact of the program has been high as well ... WPI was recognized for going beyond library types and geographic boundaries seen in many statewide programs." A Washington State Library program administrator said, "No other continuing education program has had this great of a reception in the past ten years ... This effort has proven to be a model of the 'next wave' of statewide preservation programs in its broad programmatic offerings and wide audience appeal." The survey results are available at <http://www.secstate.wa.gov/library/libraries/projects/presTomsFinalSurveyReport.pdf>.

In 2004-05, to meet the need for more comprehensive training than could be provided in one-day workshops, the Pacific Northwest Preservation Management Institute (PMI) was held at the University of Washington Libraries. It was funded by an IMLS grant to the Northeast Document Conservation Center. Partners included several members of the Regional Alliance for Preservation (RAP) and the University of Washington Libraries. PMI included three weeks of training over a period of eight months. An initial week of training at UW was followed by assignments to be completed by participants at their home institutions. A second week of training was also followed by at-home assignments to be completed before the third and final week at UW. A total of 23 librarians, archivists, and museum curators from Idaho, Oregon, and Washington participated.

"Preservation 101" was funded by an IMLS grant to NEDCC. This was a 2006 online distance learning program that provided preservation training to 20 staff members from smaller libraries, archives, historical societies, and museums in Alaska, Oregon, and Washington; some in remote locations. The students worked online with mentors to help them and completed assignments.

In June 2006, an Alliance for Response Forum, a project of Heritage Preservation, was held in Seattle at the Museum of History and Industry. The goal of the Forum was to foster dialog between first responders (firemen, policemen, etc.) and representatives of cultural institutions (archivists, conservators, librarians, and museum curators) to improve readiness to respond to disasters. It brought together 86 people, most of whom didn't know each other and would not have met in the course of their normal work lives, giving each group a better understanding of the other's concerns and needs in responding to emergency situations.

The Washington State Library, Washington State Archives, and University of Washington Libraries are among the collaborators in the Western States and Territories Preservation Services (WESTPAS), a new group that is helping to provide preservation training in the western US. Funded by a federal National Endowment for the Humanities grant, 6 preservation librarians in the western US are involved as planners and trainers. Initially WESTPAS will provide disaster preparedness and emergency response training in western states. A series of 38 workshops in 11 states and three US Pacific territories were held from Fall 2007 through December 2008. In WESTPAS' first two years, 858 registrants from 475 institutions participated in the workshops; 389 of the institutions completed PreP disaster plans. In Washington there were 81 participants from 49 institutions in workshops held in Kennewick, Seattle, and Spokane. A total of 41 Washington institutions completed PreP disaster plans. Additional WESTPAS workshops are scheduled in Seattle and Vancouver, WA, in the Fall of 2009.

The Museum community in the state has long supported preservation and conservation activities. Much of this work has been through The Washington Museum Association (WMA), a non-profit, professional membership organization founded in 1981 to provide a voice and a forum for Washington museums, including cultural and science centers, art and historical organizations, zoos, aquaria, and gardens. WMA conferences have included workshops on preservation topics. The Balboa Art Conservation Center has sponsored its Focus on Collections Care workshops in Seattle in 2004, 2006, and 2008 and has also given workshops at WMA conferences. The workshops are oriented towards the needs of museums. As noted above, 52 museums in Washington have had conservation assessment of their collections, environmental conditions, and sites through the IMLS funded/Heritage Preservation coordinated Conservation

Assessment Program (CAP). Museums also participate in preservation workshops offered at the Washington State Archives and Washington Heritage Resource Center affiliated with the Washington State Historical Society.

Individual museums have made strides to enhance the preservation of their collections. In 2001, the Seattle Art Museum (SAM) established its first in-house conservation department, with the Neukom Conservation Studio at the downtown museum opening in 2003. The department aims to serve as a local preservation resource. SAM Conservation houses a conservation library and a modest array of analytical instruments that can be used by private conservators. It has also hosted professional speakers, symposia, and workshops and the conservation staff has taken part in local preservation initiatives. The Washington State Historical Society recently established a cold storage facility for nitrate negatives. The Museum of History and Industry received three WPI grants, the Museum of Flight two WPI grants, and the University of Washington Burke Museum one WPI grant to help preserve collections in their museums. Five museums, including the Highline Historical Society and the Yakama National Cultural Heritage Center, participated in the WPI Film Preservation Project coordinated by the University of Washington Libraries. The Northwest Museum of Arts and Culture was an important contributor to the 2006-08 project coordinated by the University of Washington Libraries to microfilm significant agricultural literature relating to Washington. Museum curators and librarians have participated in WPI and WESTPAS workshops and in other training opportunities and projects described on pages 2 and 3.

Much of the background information and documentation of the preservation needs in the state which appears in this report was taken from existing reports and incorporated into this document to provide context and continuity. The report also reflects the content of the Work Group reports, discussions at the two Connecting to Collections conferences, and comments of the Steering Committee members.

## **Preservation Needs**

The efforts to help safeguard the cultural heritage of Washington outlined above resulted in a preservation vision, a heightened awareness of preservation, many staff members gaining preservation training, assessments of the preservation needs of some libraries, some exemplary preservation projects, and a constituency of committed professionals within the state. To build on this base and meet unaddressed preservation needs, Washington's Connecting to Collections project and the resulting model statewide preservation plan will address four issues targeted by the project Steering Committee based upon the WPI surveys and group discussion:

1. **Collaborative disaster planning.** In the 2006 WPI Survey only 14% of institutions said they had a written disaster plan; another 10% said a plan was being prepared. This preservation focus addresses the Heritage Health Index (HHI) recommendation that collecting institutions "develop an emergency plan." (Source: Alliance for Response and 2006 WPI Survey.)
2. **Building sustainable institutional preservation programs.** This focus includes helping institutions identify and prioritize their preservation needs by providing training, pertinent resources and models, and preservation assessments. "Another key area of concern, which many libraries asked for assistance in addressing, is development of workflow, staff time, and staff funding to do preservation work at individual institutions" (2006 WPI Survey). This preservation focus addresses the HHI recommendation that collecting institutions "provide safe conditions for their collections and assign responsibility for collections' care."
3. **Advocacy.** "... even greater marketing of future preservation efforts needs to be done" (2006 WPI Survey). The HHI suggests, "collecting institutions marshal public and private support for and raise public awareness about collections care."
4. **A sustainable statewide preservation program.** Washington needs an organizational model and funding for continuing preservation collaborations in the state. "Funding was seen as the biggest preservation challenge to the libraries surveyed" (2004 WPI Survey). A sustainable statewide preservation program is key to achieving the HHI recommendations for our state.

## **Planning Process**

### ***Partners and Steering Committee***

The partners in the application were:

- Washington State Library
- Washington State Archives
- Washington State Historical Society
- University of Washington Libraries
- Washington Library Association
- Washington Museum Association

The group received a \$40,000 planning grant as part of the IMLS National Leadership Grant Connecting to Collections Initiative.

The partners for the application formed a steering committee which is chaired by Gary Menges, a representative of one of the partners, the University of Washington Libraries. The Project Director was Rand Simmons, Washington State Library, and the Project Manager was Susan Barrett, Washington State Library. Committee members included: Tamara Georgick, Washington State Historical Society; Rayette Sterling, Washington Library Association; Jolena Tillequots, Yakama Nation Library; Janda Volkmer, Washington Museum Association; Erin Whitesel-Jones, Washington State Archives; and Diane Hutchins, Washington State Library. The Steering Committee worked through face-to-face and virtual meetings.

The Steering Committee, responsible for oversight of the Connecting to Collections project activities, is comprised of representatives from a wide spectrum of cultural heritage institutions in the state of Washington.

The committee was responsible for developing the first and second planning conferences, creating the four work groups charged with addressing the four preservation concerns, and monitoring the progress of the work groups. The Steering Committee members are also responsible for finalizing the statewide preservation plan and seeking adoption of it from their respective cultural heritage organizations. The majority of meetings are held online, using Wimba software. The software allows the sharing of visual materials in PowerPoint format, and discussion via text chat and oral communication. Meetings are generally held on a monthly basis. Additional communication is done using email and conference calls. On occasion, face-to-face meetings are held when further discussion is required. A roster of the current Steering Committee members is attached to this document as Appendix 5.

### ***Website***

A website was developed (<http://www.secstate.wa.gov/library/libraries/c2c/>) in the first weeks of the project to provide information about the activity. It also served as a means to communicate about the conferences. In the interest of "going green," many conference handouts were posted on the website and not printed. This included speaker PowerPoint presentations. All materials printed for the conference packets were also posted to the web site.

### ***First Conference***

An initial 1.5 day conference was scheduled to address the four preservation issues noted above:

1. Collaborative disaster planning;
2. Building sustainable institutional preservation programs;
3. Advocacy; and
4. Building a sustainable statewide preservation program. The Initial Planning Conference began the process for developing a statewide plan for preserving the collections of Washington's cultural heritage organizations.

The Connecting to Collections initial conference was held October 16-17, 2008, at the State History Museum in Tacoma, WA. The facility was provided without charge, thanks to the Washington State Historical Society, a project partner.

To many people's memory, this was the first time individuals from Washington's major cultural organizations had gathered in one place with one purpose: the development of a statewide preservation plan. A total of 86 participants attended (based on the October 16 morning count) and came from all parts of Washington State, with some organizations sending multiple individuals.

## **Desired Outcomes**

The desired outcomes of the initial conference were to:

- Raise awareness of the grant project,
- Convene members of Washington's cultural heritage organizations,
- Review progress toward preserving the collections of cultural heritage organizations throughout the nation and in Washington,
- Begin initial discussion of the four HHI issues around which the statewide preservation plan is to be focused, and
- Build buy-in to the project by soliciting individuals to participate in workgroups.

All desired outcomes were achieved.

## **Participants**

Participants were invited from Washington's preservation constituency. Approximately one-third of the participants came from libraries, one-third from museums/historical societies, and one-third from archives and other cultural organizations. We were fortunate to have five representatives from Washington's tribal community and five Board members of the Washington Museum Association among the participants.

The second set of individuals invited to the conference was decision makers, with 13 in attendance. Among these guests that attended the conference were Sam Reed, Washington Secretary of State; Jan Walsh, Washington State Librarian; Jerry Handfield, Washington State Archivist; Dave Nicandri, Director of the Washington State Historical Society; Senator Karen Fraser; and Representative Pat Lantz. In addition, five Board members of the Washington Museum Association attended the meeting.

## **Program**

The one-and-a-half-day program was a combination of greetings from decision-makers, presentations from preservation experts, and small group discussions by participants. The full program can be found on the grant project web site at <http://www.secstate.wa.gov/library/libraries/c2c/program.aspx>.

## **Day One**

During the first morning session on October 16, background information was presented by Tom Claeson, PALINET, on preservation efforts in the United States and sustaining preservation. Gary Menges talked about preservation efforts in Washington and the Pacific Northwest, including the Washington State Library's WPI, the 2000 Swimming Upstream conference, the Preservation Management Institute, the PreservationNW listserv, the Seattle Alliance for Response, and WESTPAS preservation training occurring in the western states and territories. Gregor Trinkaus-Randall, working as a freelance presenter, but associated with the Massachusetts Board of Library Commissioners, talked about statewide preservation efforts in Massachusetts and elsewhere.

In the afternoon, participants separated into small groups to discuss the four preservation issues. Following the small group discussions, all conference attendees reconvened at the State History Museum and reported their discussions. Tom Claeson observed trends in the reporting. Several of the groups spoke about the Library Services and Technology Act, a funding source previously unknown to some attendees, and the importance of such a resource for preservation efforts. The Washington State Library's

LSTA-funded WPI received much attention. Participants pointed to WPI as a model for coordinating planning, training, grants, and consulting statewide for all cultural organizations.

Earlier in the day, Secretary of State Sam Reed described the Heritage Center to the participants. The center is a museum/learning center/library/archive facility planned for the State of Washington. It will contain the Washington State Library and Washington State Archives. Many participants thought the Heritage Center could be the locus for a centralized preservation officer or organization that would address the preservation needs of Washington's cultural organization community. (As of July 2009, the implementation of this project was postponed due to economic conditions).

Participants were asked to sign up for the discussion topics as part of the registration process and then assigned to discussion groups. Before dismissal, pledge cards were distributed on which participants indicated willingness to work on recommendations for the statewide preservation plan in small groups over the winter and early spring. About 40 cards were received. Utilizing these cards, the Steering Committee selected Work Groups to continue discussions and make formal action recommendations at a second conference leading to the development of a statewide plan.

## **Day Two**

An opening panel focused on working with lawmakers, funding agencies and foundations, but was not itself about fundraising nor was it a fundraising activity. Representative Pat Lantz (26th Legislative District) was a member of the panel, as were Scott Merriman (Deputy Director, Washington State Association of Counties), Eric Taylor (Heritage Lead, 4Culture), and Dick Thompson (Co-Principal, Thompson Consulting, and Liaison to Gov. Christine Gregoire on Federal Stimulus Funding Tracking). Mary Thompson, (Co-Principal, Thompson Consulting, former State SHPO, and Trustee of the National Trust for Historic Preservation) was the moderator. The group discussed many important themes, including fostering relationships; finding friends who can champion your cause; getting to know legislators before you ask for their support; having patience with the speed of the legislative process; presenting a united front; "sustaining something once you have it;" and emphasizing the importance of heritage including its economic impact.

The final guest speaker of the morning (and the conference) was Laura K. Lee Dellinger, Senior Vice-President for the Metropolitan group based in Portland, OR. Her talk focused on raising public awareness and developing partnerships. Tom Clareson's remarks summed up the conference and pointed toward next steps. State Librarian Jan Walsh expressed appreciation to those who attended the conference, the speakers, and the supporting staff.

## **Evaluation**

A link to a post-conference evaluation using the Survey Monkey online survey tool was sent to conference participants by email. 43 individuals responded representing all types of cultural organizations. Individuals indicated that, because of the conference, they were more confident in their understanding of all four HHI issues with collaborative disaster planning rating the highest (80.5%). Participants ranked small group discussions and the presentation on raising public awareness and building partnerships as the most valuable parts of the conference.

Among the questions addressed in the evaluation was one on the highest priority issues for a statewide preservation plan. Audience comments included:

- Create cooperative disaster response groups;
- Disaster planning;
- That the program be designed by individuals from a diverse range of institutions; the outreach arm of the program be a crucial priority; and the program build on and learn from past programs;
- Economics, bringing two sides of the state together, geographics, developing an awareness of the importance of such a program with the legislators;
- Finding a central organization and funding to secure a central office of preservation;
- Educate legislators and develop statewide plan that includes funding to bring all cultural institutions up to speed; this funding could be granted by a statewide collaborative disaster committee;

- Sustainability – Unless there is a funded position, it will be very difficult to keep a program going; Volunteers can do a lot but they have other priorities;
- Leadership and collaboration;
- Resources and a location where such a program might be housed; creating something new and autonomous at this time seems unlikely but adding the function to an existing program might be possible if still a long-shot;
- Collaborative projects that directly affect individual institutions as well as build on the momentum generated at this conference.

## **Second Conference**

The Second Connecting to Collections Conference was held May 21, 2009, at the Hotel Murano in Tacoma, WA.

## **Desired Outcomes**

This conference was a working meeting for members of the Work Groups to present their reports to gather feedback through comments from the participants and a reactor panel. This was achieved.

## **Participants**

A total of 41 attended the second conference. Of that total, 46% were from libraries, 27% from museums and historical societies, and 27% from archives, tribal libraries, and other cultural organizations.

## **Advocacy Work Group**

The Advocacy Group began the program. They acknowledged that many cultural heritage professionals are not trained in public relations, marketing, and advertising, but felt that preservation advocates must become more sophisticated in their skills. A statewide, coordinated strategy of preservation advocacy was suggested, and many particularly good examples of preservation awareness and advocacy activities in Washington State were discussed.

Promotion of preservation through annual reports, magazine articles and interviews, blogs, and other methods were suggested. The Advocacy Work Group ended their presentation with a call to meeting participants to submit preservation advocacy success stories to the Work Group.

## **Collaborative Disaster Planning Work Group**

In their position paper, the Collaborative Disaster Planning Work Group emphasized building collaborative networks on disaster planning within the state, as none currently exist. The group's report included general guidelines on forming these networks, as well as specific tools (including a draft mutual aid agreement) to help form the networks.

Another important suggestion from this group was to work with other, already-existing disaster planning initiatives. For example, Washington institutions could work with the previously-mentioned WESTPAS collaborative, which is providing disaster plan development training and support. Getting to know local police, fire, and emergency management personnel was also emphasized; one way to do this is by holding additional Alliance for Response meetings within the state.

Formation of recovery networks and mutual aid groups on a county-by-county basis (because Emergency Management in the state is organized on the county and city level) was suggested by the group, but development of a statewide "Washington Collections Emergency Response Team" (WCERT), with representatives of all of the networks, was the overarching goal. The work group recommended a statewide agreement with an emergency recovery service (OSS or OFM RMD). Suggestions of how to fund the county and statewide efforts included insurance company support, FEMA funding, and grants.

The Disaster Work Group members vowed to take a lead in these efforts, and in addition will recruit WESTPAS disaster planning class "graduates," those trained by the American Institute for Conservation Collections Emergency Response Team (AIC-CERT), and attendees of the Seattle Alliance for Response forum to aid in the development of these networks.

### **Sustainable Institutional Preservation Program Work Group**

The Sustainable Institutional Preservation Program Work Group was charged with identifying elements of a statewide preservation plan that would help institutions create and sustain their own institutional preservation program. The group developed many ideas which will be of use in formulation and implementation of the statewide plan. Themes included “assess, train, model, fund, and inform.” Specifically for individual institution support, continued offerings of preservation workshops were seen as a very important source of continued institutional growth and best practices in preservation. Additionally, regular programs on preservation at cultural heritage association conferences were seen as important. Obtaining preservation success stories from model institutions, and including this information on a project website was felt to be important to this group, just as it was for the Advocacy group.

### **Sustainable Statewide Preservation Program Work Group**

The Sustainable Statewide Preservation Program Group completed the morning presentations. They discussed funding for statewide preservation activities as a key focus of their presentation. In difficult economic times, it was realized that gaining government funding (state legislative or federal funding) is difficult. One alternative idea to gain some funding was to develop a continuing preservation organization in the state with some type of membership dues. The group felt that using an independent agency as a fiscal agent would help to streamline processes and reduce, or possibly eliminate, administrative overhead.

This group felt also that the first priorities for action were to continue offering a variety of preservation workshops, and to strengthen disaster planning and recovery capabilities at cultural heritage institutions statewide. An important quote from this group was that “without committed people, statewide efforts do not have sustainability.” An independent dues-paying organization, as suggested above, would be well-suited to “lobbying the State Library to include preservation as an LSTA funding priority, and lobbying the State Legislature for dedicated funding.”

### **Discussion**

In discussion with the audience, a hybrid of preservation advocacy and sustaining the statewide program was suggested, as participants could create an information package on preservation in order to educate legislators, decision-makers, as well as Board of Trustees members at cultural heritage institutions.

The concept of “circuit-riding” preservation professionals (who visit and work with a number of institutions to start and sustain preservation programs), which has been successful in Texas and Alaska, was suggested by the Statewide group and supported by the audience. Broader dissemination of preservation “success stories” was also promoted by this group.

At lunch following the Work Group presentations, group members reconvened to integrate audience feedback into their plans. By visiting with all of the groups, the consultant was able to determine their overall interest in generating case studies, model plans and documents, and further use of the PreserveNW listserv and project website to communicate about and advocate for preservation. Additionally, there was strong support for continuing to hold at least one face-to-face meeting of the group per year.

### **Reactor Panel**

Following lunch, a “Reactor Panel” composed of decision makers added their thoughts to the day’s discussion. Panelists included Jan Walsh, Washington State Librarian; Dave Nicandri, Director of the Washington History Museum; Charles Chamberlin, Senior Associate Dean of University Libraries, University of Washington; Susan Hildreth, City Librarian for Seattle and former California State Librarian; Candace Lein-Hayes, Regional Administrator, National Archives and Records Administration Pacific Alaska Region, National Archives-Pacific/Alaska Region; and Laura Thayer, Curator of Collections, Northwest Museum of Arts and Culture.

Walsh spoke of the State Library's strong commitment to heritage institutions and preservation since 2002. Nicandri noted his organization had not preserved collections to standard until the modern era, but they are now fervent preservation supporters. Chamberlin noted the critically important nature of collaboration, and its value to the cultural community; he also urged attendees to "create a culture of preservation within [their] institutions so it is imbedded in the institution's core activities and cannot be cut." Hildreth discussed the sustainability of the California Preservation Program, and its continuous record of state LSTA support. Both Hildreth and Lein-Hayes emphasized the importance of disaster planning training for the community of professionals they work with. Thayer asked participants to "keep preservation in the forefront of the minds of boards, trustees, and accountants."

When asked about the idea or concept from the day that most intrigued them, Walsh spoke of advocacy opportunities, including "celebrity conservators" and antiques roadshows. Nicandri supported the disaster preparedness efforts, but felt a regional, rather than county, networking approach might be more viable and sustainable.

With Chamberlin and Hildreth, advocacy discussions resonated. Hildreth suggested "virtual preservation advocacy" via Web 2.0, and also suggested harnessing the growing demographic of retired people to do preservation activities and advocacy. Lein-Hayes and Thayer most strongly supported advocacy – across all cultural heritage institution types and sizes.

Some panelists felt that the keys to moving the state's preservation activities forward included identifying who or what organization will be the lead agency. Would it be housed at an existing institution, or a new organization? Would it be an assigned responsibility in someone's job description? Is there a mechanism for other organizations to support it?

Walsh suggested that even with fewer staff and less funding at many cultural heritage institutions, preservation must remain a priority. She felt that the WPI was so successful it should be carried forward in name and concept. She suggested that the partner institutions for Washington's Connecting to Collections project should continue to work together to carry the momentum of the two conferences and Work Groups' efforts forward. Nicandri suggested potential funding streams for the effort, such as the Legislative Heritage Caucus, Heritage Capital Grants program, and money from recording deeds within the state.

At the end of the day, consultant Tom Claerson provided a summary of the day's discussions. Then he and Connecting to Collections Project Director Rand Simmons discussed next steps for development of a statewide preservation plan.

In June 2009, the Steering Committee was expanded to include the three Work Group facilitators who had not previously served on the committee. The current Steering Committee is composed of representatives from a wide spectrum of cultural heritage institutions in the State of Washington.

**Organization**

Eastern Washington University (for Washington Library Association)  
Renton Technical College  
Seattle Art Museum  
University of Washington Libraries  
Washington Museum Association  
Washington State Archives  
Washington State Historical Society  
Washington State Library  
Yakama Nation Library

**Community Represented**

Libraries  
Libraries  
Museums  
Libraries  
Museums  
Archives  
Historical Societies  
Libraries  
Washington State Tribal libraries

The breakdown of the committee by number of representatives is as follows:

Libraries	5
Archives	1
Historical Societies and Museums	3
Tribal Libraries	1
Project Staff	2

## **Statewide Preservation Plan**

In the development of a plan to move Washington's preservation activities forward, five elements should be considered. Taking action on all of these fronts will help to continue the momentum of the WPI, Washington's Connecting to Collections Project, and the work of individual Washington cultural heritage institutions in preserving their collections. Continued work in Organization/Governance, Funding, Communications/Education, Disaster Preparedness, and Advocacy and Sustainability will move the WPI toward becoming an integral part of cultural institution practices in the state. A description of necessary activities in all of these areas makes up the core of Washington's Preservation Plan.

### ***Organization/Governance***

During their work together as partners on the WPI, and even more widely during the Washington Connecting to Collections Project, some of the state's leading institutions and associations formed a collaborative alliance which must be continued in the future to ensure their constituents, the state's cultural heritage community, and the citizens of Washington have continued access to important collections within the state.

The Washington State Library, Washington State Archives, Washington State Historical Society, University of Washington Libraries, Washington Library Association, Washington State Tribal Libraries, and Washington Museum Association and their staff and members have come together, especially in 2008-09, in a cooperative manner which few long-time cultural professionals in the state can remember seeing before. The broad representation of institution types in the first and second Connecting to Collections conference, and the Work Groups in between, have galvanized support from all sectors of the cultural community for statewide preservation action.

Because this unprecedented cooperation has worked so well, the "vehicles" for cooperation developed during the LSTA and other IMLS projects should not be changed; only strengthened and enhanced.

### **Steering Committee**

It is recommended that the current Steering Committee structure be continued, with changes in personnel only as terms of service conclude or other professional responsibilities make members unable to continue.

### **Work Groups**

At the May 2009 conference, although the Steering Committee was not sure if the Work Group members wanted to continue their service, each group, in either their presentations or discussion with the project consultant, expressed strong interest in continuing their work.

Some groups, such as the Collaborative Disaster Work Group, have worked to complete their planning documents (for instance, the Model List of Disaster Recovery Supplies). Other groups were motivated by the May Conference to carry their work into future phases.

It is recommended that the Advocacy and Collaborative Disaster Response Work Groups continue as they are, and the two Sustainability Work Groups be combined. This combination is suggested as a result of written and spoken comments that strengthening and sustainability of institutional preservation programs will help to sustain the statewide program, and vice versa.

## Washington Preservation Initiative Champions

Many of the state cultural heritage decision makers on the Reactor Panel at the May 2009 Conference suggested the need for, and desire to work on, a WPI Champions Committee to assist the Steering Committee and Work Groups in the further development of the state's preservation program.

Utilizing the political and funding prowess of the top administrators from each of the partner institutions to develop strategies for continued support of the statewide program will be extremely beneficial to the effort.

Additionally, WPI Steering Committee members felt it was important to identify champions from outside of the partner institutions and cultural heritage community to join the Champions Committee and provide an enthusiastic voice for the general public's support of preservation.

It is recommended that such a committee be named and hold their first meeting in Fall 2009, in order to aid the immediate planning and funding needs of the statewide effort. Working with the Steering Committee, the Champions Committee should also deliberate if the responsibility for a statewide preservation program will continued to be shared, or will become resident in one institution. The group will develop a recommended organizational structure to indicate chains of responsibility.

## Infrastructure and Staffing

*"A key factor in successful statewide preservation efforts is having a core of dedicated people. Without this core statewide efforts do not have sustainability"* – Building a Sustainable Statewide Preservation Program Work Group Report (Appendix 4).

Initially, the Connecting to Collections steering committee and work groups will continue to function as noted below. As an infrastructure evolves, the work of these temporary groups will be absorbed by the permanent bodies. There are many models for statewide preservation programs (see Appendix 4 Building a Sustainable Statewide Preservation Program for Washington State). We are proposing a hybrid model that includes an independent, non-profit corporation and, in the long-term, a statewide coordinator for the WPI within an existing state agency.

## Washington Preservation Consortium

The Washington Preservation Consortium (WPC) would be an Independent non-profit 501(c)(3) corporation with a sliding dues-based membership. It would hold an annual conference and serve as an advocate group for preservation in the state. Models for such a consortium exist in Iowa <http://web.grinnell.edu/individuals/stuhrr/icpc/index.html> and North Carolina <http://www.ncpreservation.org/index.html>.

## WPI Manager

In the longer term, the goal is to have a WPI Manager based in the Secretary of State's Office who would provide preservation assistance and outreach services to the State's cultural institutions. Massachusetts has a statewide preservation specialist on the staff of the Massachusetts Board of Library Commissioners (<http://mblc.state.ma.us/advisory/preservation/index.php>).

## Funding

During a time of economic crisis, it may be difficult to continue funding for preservation efforts. However, both the Work Groups and the Reactor Panel at the May 2009 Conference felt preservation was a shared priority for the state, and they had a number of excellent leads to explore for future collaborative preservation program funding in the state. Potential funding sources include:

- IMLS Connecting to Collections Implementation Funding
- The Heritage Capital Grants Program
- Washington State Library, Library Services and Technology Act (LSTA) funding
- Local, State, and National Foundation support

Utilizing this Statewide Preservation Plan as a basis for a detailed work plan, it is recommended that the Steering Committee, newly-combined Sustainability Committee, and the newly-developed WPI Champions Committee hold a joint meeting in Fall, 2009, to develop a course of action for future program funding, laying out a schedule of funders to approach by date/deadline, fit with the program's mission, and feasibility of receiving funding from the specific funder organization.

Additional areas where funding support is most needed are the Preservation Site Survey program and Grant program originally developed by the WPI. These efforts were true "differentiators" for the WPI from many other statewide preservation programs, as they allowed institutions to have their current preservation status assessed, then to improve upon that status through grant-supported projects and programs.

## ***Communication***

As detailed in the Work Group reports, the WPI survey reports, and in comments at the two Connecting to Collections meetings, the State of Washington had extensive success in raising awareness of, educating constituents on, and supporting grant programs dedicated to preservation during the era of the WPI. In addition to becoming a recognized "brand" and program/funding sponsor in the state, the WPI became known throughout the nation for its programmatic activities. One of the strongest recommendations in this plan is to re-establish this highly-regarded name as the future name for collaborative activities within the state. Beginning with the first meetings and efforts generated by this report, all future activities of the program should occur under the "WPI" umbrella.

Continuation and extension of current communications activities is also highly important. The Preservenw listserv, which now reaches 356 subscribers, should continue to be utilized for Washington preservation planning. Even though there are subscribers from outside the state on this listserv, their knowledge of and feedback on WPI activities can only be beneficial to the WPI program and preservation activities in their own states.

Additionally, the Washington Connecting to Collections website has become, in less than a year, an excellent repository for information about statewide preservation plans and activity. Whether continued as an effort of the Washington State Library, or re-established as an independent website, this important resource should continue to be allowed to grow.

## ***Education***

Finally in this area, one of the most important ways in which the WPI extended its influence was through the provision of workshops throughout the state. In some cases, classes were led by Washington-based preservation experts; other sessions featured national experts contracted to present in Washington. Independently, "traveling" workshops by Regional Alliance for Preservation organizations and other national associations were scheduled in the state.

Under "management" by the Steering Committee, or, if necessary, by a new committee to be established in the future, preservation workshops at the planned "pace" of one per quarter in both eastern and western Washington will be scheduled.

Finally, project partners and participants should be continually encouraged to give presentations on preservation and the WPI at cultural heritage-related meetings and conferences, as well as to the general public.

## ***Disaster Response***

Among the Work Groups, the Disaster Response committee set out the most specific goals for its work in both its documentation and presentation to the May Conference.

At the Conference, the work of this group was acknowledged by the other Work Groups and the Reactor Panel alike as being a cornerstone of activity to protect Washington's cultural heritage collections.

The work of this group should be continued, and even expanded, to set a baseline for collection safety. Among the key efforts to be carried out:

- Completing and disseminating the Model List of Disaster Recovery Supplies.
- Establishment of three to four County or Regional Disaster Response Networks.  
In order to test the feasibility of the proposed network structure and mutual aid agreements, the Disaster Response Work Group should have a goal to develop 3-4 networks by May 2010, when a meeting would be held to discuss the establishment and growth of the programs. At the May 2009 conference, at least three localities (Seattle, Tacoma/Olympia, and Bellingham) expressed interest in beginning work immediately on such networks; an Eastern Washington County or metropolitan area should be targeted for development of another of these pilot networks.
- Statewide Response Team.  
Once some initial County/Regional networks are established, the move toward a statewide team can begin in earnest. Implementation of the plan detailed in Appendix 2 of this group's report for the "Washington Collections Emergency Response Team" (see page A2-4) should begin as soon as possible, with a target date for full implementation of December 31, 2010. This will include contracting with an established commercial disaster recovery company, and other statewide supply or service contracts as seen necessary.
- More "Alliance for Response" Initiatives.  
In addition to the above activities devised by the Work Group, it is strongly suggested that the State of Washington, with or without funding from Heritage Preservation, utilize that organization's "Alliance for Response" program in an eastern Washington location such as Spokane, to strengthen the relationship of cultural heritage and emergency response professionals in that location.

### ***Advocacy & Sustainability***

To continue building awareness of and support for preservation in the State of Washington, the Advocacy and two Sustainability Work Groups, among their other findings, suggested the development of case studies or models of successful institutional preservation activities or programs as a learning tool for other institutions in the state.

Through the continued work of the Advocacy Group, and the newly-combined Sustainability Group, the writing and dissemination of these case studies/models should begin immediately. Ranging from one to four pages, and including illustrations whenever possible, these studies can be made available on the Web and as PDFs for printing. The Work Groups should begin to solicit and publish these success stories as soon as possible, with the goal of presenting three to four per year, and at least two before the end of calendar 2009.

Additionally, these Work Groups should promote the development of conference programs on the WPI as was previously mentioned.

Two potential additional activities which could be addressed by these groups and/or the Steering Committee:

- Advocacy and education on the preservation and sustainability of Washington's born-digital and digitized materials; and
- A program of evaluation, via surveys or focus groups on a three-year basis, to determine the longitudinal impact of the WPI program.

Through programmatic activity in these core areas, the WPI can continue its success, and continue to act as a model statewide preservation effort for a majority of states across the nation.

**Appendix 1:  
Advocacy Work Group Report**

## Final Report Advocacy Work Group May, 2009

### Work Group Members:

- Nicholas Dorman, Seattle Art Museum (Facilitator)
- Diane Hutchins, Washington State Library (Writer)
- Steve Baylor, Washington State Genealogical Society
- Victoria Blackwell, Harbor History Museum
- Rosalynn Bland, Lummi Indian Business Council
- Betsy Cherednik, Mount Vernon City Library
- Joan Curtis, Steilacoom Museum
- Howard Giske, Museum of History and Industry
- Marcea Horst, Washington State Library
- Jesse Clark McAbee, Cowlitz River Valley Historical Society
- Ellen Terry, Humanities Washington
- Janet Thomas, Stevens County Historical Society

### INTRODUCTION

The Institute of Museum and Library Services (IMLS) launched *Connecting to Collections* in June 2008 as “a national initiative to raise public awareness of the importance of caring for our treasures, and to underscore the fact that these collections are essential to the American story.” We who attended the Connecting to Collections: Preserving Washington’s Cultural Heritage conferences know how important it is to preserve our cultural and historical collections. However, convincing others of the importance of preservation is sometimes a tough sell. The Advocacy Work Group collaborated to answer the following questions:

- How can you raise awareness of preservation within the “community” you serve?
- How can natural partners contribute to the promotion of preservation within your “community?”
- What is the relationship between the preservation community and sponsors?
- What strategies can be developed to convince decision-makers to put financial support behind local and statewide preservation efforts?

### How can you raise awareness of preservation within the “community” you serve?

Many unique local and regional treasures may be overlooked because they lack the national or international cachet of a Mount Vernon or British Museum. Your communities may not realize that preservation is just as critical in their own backyards. For many, the concept of preservation may be off-putting, with images of objects under glass, guards at the door, and arcane knowledge held by a chosen few. Making preservation relevant to those you serve is essential to building support from your community. Begin by telling a story and sharing your passion!

- **What success stories can you share?**

### RECOMMENDATIONS:

- Advocacy begins at home!
  - Just begin – do what you can and grow from there.
  - Train your staff – turn worst practices into best practices.
  - Have a preservation site survey done by an **outside**, reputable consultant. Using the services of someone outside of your organization will lend more weight to the resulting recommendations, and avoid the risk of a critique appearing to be too personal. The survey can lay a foundation for your preservation program and justify support for it.
  - Funders want specifics: use the site survey or your local conservators to identify costs of preservation activities. Knowing these costs will help you to define your preservation priorities or establish an “Adopt-an-Object” program
  - Dedicate one staff member to preservation.

- Think big! Dedicate an entire department to preservation.
- Collaborate with other colleagues. Conservators at local and national organizations are (almost) always really happy to help smaller organizations- they definitely consider it part of their duty. Find out how to select and locate a conservator at AIC (<http://www.conservation-us.org/>) or local museums/libraries.
- Have an open house and show off what you have done.
- Give in-house presentations on conservation and preservation – PowerPoint and a digital camera can be your best friends!
- Go beyond your immediate institution – do outreach on preservation!
  - Educate your donors – What is meant by preservation? What is meant by conservation? Demonstrate the difference.
  - Make your message relevant to your audience. If possible, and if appropriate for your audience, hook into popular culture. (See the Kelsey Museum’s references to Indiana Jones at <http://sitemaker.umich.edu/kelseymuseum.digdiary/home.>)
  - Work with your PR department to get air time and news coverage.
  - Take your presentations on the road – think “Antiques Roadshow!”
  - Host workshops, symposia, lectures, etc.,
  - If you have a Web presence, make sure it is maintained and remains fresh.
  - Find other partners for training, sharing, presenting.
    - Consortia (e.g., BCR, AMIGOS, LyraSis [formerly SOLINET], etc.)
    - Other institutions (libraries, museums, universities, etc.)
    - Professional organizations (AIC, AAM, Society of American Archivists (SAA), Association of King County Historical Organizations (AKCHO), the Western Association for Art Conservation (WAAC), etc.)
    - Outside resources (NEDCC, OCLC, etc.)
- Show and tell
  - Look at your collections with new eyes – through a preservation lens!
  - Create special exhibits about preservation and accompany them with symposia, workshops, lectures, catalogs, etc.
  - Make your displays relevant to your audience.
  - Use interactive kiosks or Web sites to engage your audience – but be sure to keep them current!
  - Create an exhibit of “needy” objects, with a conservator hired in advance to recommend required treatments and estimated costs. Publish a catalog in advance. At the opening reception, invite potential donors and solicit their support on the spot to fund the needed treatments... “adopt-a painting”!
  - Pull together a mini annual report or bulletin on your preservation activities. It doesn’t need to be big but, over time, this type of structured approach is helpful in-house and as you reach beyond the institution to raise funds.
- **Based on past experiences how might you do some things in the future?**
  - Continue to publicize projects in-house.
  - Continue to publicize projects to an audience outside of the institution.
  - Feature conservators at work as part of exhibits.
  - Use institutional tours strategically.
  - Keep outreach friendly and relevant to the audience.
  - Make more use of PowerPoint, digital cameras, the Web, other communication technologies.
- **What strategies can be developed for broadening the preservation constituency to include individuals in the community, decision makers in institutions, and members of governing boards in order to build consensus on the need to support preservation activities in all kinds of collections?**

**RECOMMENDATIONS:**

- Create a preservation page for your institution.
  - Describe the duties of your preservation department.
  - Create a Blog aimed at treatment of specific items. Be sure to update it periodically!
  - Link to streaming multimedia of conservators at work.
  - Think of ways to make your page relevant to your audience. Hook them with something that will make preservation relate to their own lives.
    - Family Bibles, scrapbooks, etc.
    - Old photographs
    - Historic documents
    - Artifacts
    - Community history
    - Antiques
    - Their own personal research projects/interests
- Show (with pictures!) what can happen in a world without preservation – here today, gone tomorrow! (See IPI’s “Stored Alive” interactive Web site at [http://www.imagepermanenceinstitute.org/shtml\\_sub/storedalive.html](http://www.imagepermanenceinstitute.org/shtml_sub/storedalive.html).)
- Turn a conservator into a celebrity and create a following. (If chefs can do it, why not conservators!)
- Provide placements for work study students and encourage them to work on preservation projects with you. Your preservation efforts can even become great material for middle or high school projects and even small children love behind the scenes tours.
- Show how preservation can benefit the local community by contributing to economic development and promoting tourism. Get your local community actively involved in special projects, if possible. See a great example, “Please Touch – It’s Hands On for Historic Preservation” at <http://www.preservationdirectory.com/preservationblogs/ArticleDetail.aspx?id=767&catid=4>.
- Develop an advocacy group to:
  - Spread the word about preservation
  - Identify resources to support the program
  - Help in fund raising for specific projects
- Create a small leaflet about preservation.
  - Explain the why and how of what you do in language that your audience will understand.
  - Explain why you have certain rules, but keep it friendly!

**Discovering natural partners – either for your particular organization or for your type of organization (library, museum, archive, historical society).**

During tough economic times, finding partners to promote and support preservation can be one way to keep the momentum going. Whether it is networking with colleagues and sharing expertise, having access to specialized equipment or a lab, using economies of scale to make affordable training available, or simply finding moral support from like-minded individuals to keep going, partnering can yield a variety of benefits. In cases where you are able to provide expertise to your partners, you benefit and gain institutional credibility by being able to serve as a source of information or skills for the larger community. By being a part of a professional network and establishing relationships with partners, you keep on top of developments in the field and may also be eligible for various types of support.

- **What success stories can you share?**
  - Partners can be:
    - Educational institutions
    - Museums
    - Libraries
    - Archives
    - Hospitals
    - Religious institutions
    - Regional consortia (e.g., AMIGOS, Lyrasis [formerly SOLINET])

- Professional organizations (AAM, SAA, AIC, Association of College and Research Libraries (ACRL), and the Foundation of the American Institute for Conservation of Historic and Artistic Works (FAIC))
  - First responders
  - General and Corporate Foundations (e.g., Andrew W. Mellon Foundation, FAIC, American Express, Bank of America, etc.)
  - Public agencies (IMLS, NEH, NEA, National Historical Publications and Records Commission (NHPRC))
  - Local, regional, national, or international
- Partners can provide:
  - Resources (space, equipment, emergency response collaboration)
  - Volunteers
  - Expertise
  - Creative solutions
  - Training
  - Financial support
  - Publicity
  - Moral support
- **How has partnering brought strength to your organization?**
  - What's in it for your institution?
    - More expertise
    - More technical resources
    - Financial resources
    - More energy
    - More publicity
    - Access to specialized equipment
    - Institutional respect
    - Invaluable man- (or woman-) power
- **Were there weaknesses or threats in partnering?**
  - Choosing the “wrong” partner.
    - The partner may have nothing to bring to the table.
    - The “fit” doesn't work (apples and oranges).
    - The partner may be less of a cooperator and more of a competitor
  - Lacking enough resources to do a good job (spread too thin).
  - Failing to balance the needs of your institution with the needs of the partners.

**Community sponsors anticipate that they will receive something from the relationship in turn for what they give (e.g., funding, radio time, gifts).**

- **What type of sponsorships have you developed?**

Some institutions, especially in the public sector, may be restricted by law or ethics rulings from offering particular goods or services in return for donations. At the very least, recognition and appreciation for sponsorship in the form of a certificate and recognition event, can be given in return. Other sponsorships, where permissible, can take the form of:

  - Naming rights for a building, wing, preservation endowment, preservation chair (corporate or personal)
  - Adoption of objects, books, or buildings needing preservation (corporate or personal)
  - Volunteers (community service, corporate)
  - Donations of equipment, supplies, products, services (corporate or personal)

- **How were you able to convince the sponsor that they would benefit from the relationship? What type of benefits were you able to show them?**

“What in it for me?” Benefits should be geared to the interests of the sponsor. Depending upon the institution, as mentioned above, benefits can range from a simple certificate of recognition to naming rights on an entire building or endowment. Benefits can include:

- Self-esteem
- Tax deduction
- Perpetuating a family or corporate name
- Favorable publicity
- Special privileges (e.g., behind the scenes tours, VIP access, donor receptions, etc.)
- Contributing to the public good
- Knowing that history will be preserved for their descendents
- Learning how to take care of their own family/corporate treasures
- Tangible results – seeing how an object looked before and after treatment.

It should be said that many donors simply want to help a valid cause that excites their imagination- in these cases, the only prerequisite for support is a genuine need combined with the right connections, a little passion for the project, and the time to make the case.

### **What strategies can be developed to convince decision-makers to put financial support behind local and statewide preservation efforts?**

#### **RECOMMENDATIONS:**

- **Federal government**

Show how preservation efforts can provide an economic stimulus at both local and state levels, thus providing a return on the investment of federal dollars. Examples:

- The economic stimulus generated by tourism dollars, including souvenirs, hotels and restaurants, airlines, rail, automobile rental, service stations, etc.
- The economic stimulus generated through the purchase of supplies and equipment required by conservators as well as materials and labor needed for the construction of exhibits
- Jobs created in construction and other trades through the construction of new museums, libraries, and archives

Demonstrate how combining federal, state, local, and non-profit dollars can create financial strength in numbers to move preservation efforts forward.

Professional organizations can be excellent advocates for preservation by lobbying members of Congress. (An excellent example is the advocacy page of the American Association of Museums at <http://www.speakupformuseums.org>.) The National Trust for Historic Preservation has an in-depth page on advocacy at <http://www.preservationnation.org/take-action/advocacy-center> as well as links to potential advocates, such as the Congressional Historic Preservation Caucus. And, last but not least, check out the C2C website that has an array of links on fundraising for preservation: <http://www.imls.gov/collections>.

- **State government**

- Show how the investment in preservation can stimulate the economy at the state level, providing tax dollars to fund state government.
- Show how preservation efforts can be used to educate school children and make them more informed citizens.
- Explore opportunities to partner with state and local advocacy groups. The American Association for State and Local History (AASLH) has an advocacy page at <http://www.aaslh.org/htopics.htm>. “The Gift of History” on their Web site (<http://www.aaslh.org/documents/GiftOfH.pdf>) provides a compelling argument, in lay terms, for why preservation matters.
- Advocate for the value of preserving local history and regional collections.

- **Local – city or county – governments**

Present the projected financial benefits of supporting preservation in the local community:

- Local businesses will benefit from tourism dollars
- Preservation projects will provide publicity and recognition to the local community
- Preservation efforts will contribute to civic pride
- Preservation efforts can make history come alive for local school children

- **Granting agencies and Foundations**

Utilizing multiple sources of funding, such as grants and foundation dollars, for well-defined projects can result in economies of scale and sharing of resources. Successful projects can be magnets for potential donors. Doing a “show and tell” can illustrate the benefits of giving in a way that makes preservation come alive for the lay audience. Great examples of successful projects include:

- SOS! (Save Outdoor Sculpture!) (<http://americanart.si.edu/research/programs/sos>), a collaboration of the Smithsonian American Art Museum and Heritage Preservation, made possible by major contributions from Target Stores, National Endowment for the Arts, Pew Charitable Trusts, Getty Grant Program, and Henry Luce Foundation, among others.
- Treasures of American Film Archives (<http://www.filmpreservation.org>), a cooperative project funded by the National Endowment for the Arts and The Pew Charitable Trusts.

**Appendix 2:  
Collaborative Disaster Planning  
Work Group Report**

# **Final Report**

## **Collaborative Disaster Response Networks for Washington's Heritage Institutions**

**May, 2009**

### **Work Group Members:**

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Note: This list notes workgroup members with their names, institutional affiliation, county, and email address. WMA indicates that person is a member of the Washington Museum Association

### **INTRODUCTION**

Disaster Response networks have been established in many other regions of the United States. Heritage institutions have formed the networks to encourage and support disaster preparedness and response among their members. The Network members help each other by providing advice, support and/or actual recovery assistance. Networks within a state can in turn help each other to protect the cultural heritage of Washington State. Membership in a Disaster Response Network constitutes a commitment by an organization to make disaster preparedness and staff training an administrative priority.

### **ORGANIZATION AT THE COUNTY LEVEL**

Networks which are inclusive of different types of heritage institutions— archives, historical societies, libraries, and museums— reflect both the cross-cultural approach of the IMLS Connecting to Collections Initiative and the reality that all share a responsibility in preserving our cultural heritage. We recommend that Disaster Response networks be organized at the county level. There are some existing (non-disaster) regional “networks” of cultural organizations in the State (regional museum organizations, state archives regions, public and rural library districts, or networks like ORBIS/CASCADE and the Northwest Association of Private College and University Libraries (NAPCU)), but they are not inclusive of different

kinds of cultural organizations. There are also no intra state emergency management regions in Washington. An additional benefit of organizing at the county level is that most counties have emergency management divisions that disaster response networks could work with in the case of area-wide disasters.

Smaller counties might want to align themselves with larger adjoining counties. In some cases a Network may cross state lines. For example, Whitman County could organize a Network with Latah County, Idaho. The largest cities in each county are also the homes of Washington State University and the University of Idaho. The two universities are located within seven miles of each other and would be natural leaders in organizing a regional network. Another example is Clark County, where two libraries were members of the former Portals Cooperative Disaster Network based in Portland. Clark County might want to expand this relationship with Portland institutions or organize a separate Clark County Network. Very large counties may choose to organize into multiple, smaller networks instead of one large network. For example, King County may develop one network for institutions in Seattle and another for the rest of the county. The long-term objective is to provide some statewide services so that no county is left un-served.

### **DISASTER PLANNING**

There are at least three levels to disaster or emergency planning:

1. Each institution has a responsibility to develop an institutional disaster plan.
2. Collaborative disaster networks at the county level provide advice, support, and assistance to each other.
3. Statewide services are provided to provide further assistance.

### **ASSISTANCE WITH INSTITUTIONAL DISASTER PLANNING**

Many cultural institutions in Washington have already developed disaster plans for their collections. The Council of State Archivists (COA) has developed a Pocket Response Plan (PreP), which has been slightly revised by Western States and Territories Preservation Assistance Service (WESTPAS) for use in the western states. There is one for each state of the eleven states and three Pacific territories in the WESTPAS service area. Lyrasis has adapted the WESTPAS plan for use in the states that they serve. The Vermont Museum and Gallery Alliance has adapted the PreP plan for their state <http://vmga.org/aboutVMGA/disaster.html>. At least 40 institutions of various kinds in Washington have completed PreP plans. (These institutions would be good candidates for membership in county networks.) We encourage institutions that have not developed disaster plans to utilize the Washington WESTPAS plan and utilize other resources on the WESTPAS website <http://www.westpas.org> to help them develop an institutional disaster plan. A two-part WESTPAS Workshop will be held in the fall of 2009 in Seattle which will provide assistance for additional institutions to develop disaster response plans. Registration will be open to any cultural institution in the State without charge. Additionally, COA is leading an effort to provide records-related emergency training via Web and CD for state and local records <http://www.statearchivists.org/iper/index.htm>.

Institutional disaster plans should include a Continuing of Operations Plan that outlines administrative procedures for business operations in the event of a disaster. Network members cannot be expected to provide these services to other members.

### **GENERAL GUIDELINES ON ORGANIZING A COUNTY NETWORK**

We encourage Networks to be inclusive of the different kinds of heritage institutions – archives, historical societies, libraries, museums – in the county. To assist cultural organizations in a county in organizing a network the Washington Connecting to Collections Workgroup on Collaborative Disaster Planning has developed a model mission statement and a model mutual aid agreement (Appendix 2-A), both of which follow. We have also developed a draft list of disaster recovery supplies that might be considered for the Network's shared supply cache (Appendix 2-B). County networks should identify local sources for supplies and services that might be needed in a disaster. A county network may consider an agreement with a local freezer to freeze wet items (as appropriate) in the event of a disaster (For example: <http://www.portals.org/members/coldstorage.doc>).

We have drafted some recommendations on statewide services. A group organizing a Disaster Response Network is encouraged to use these documents to help get them started and to adapt them to fit their specific needs. It is essential that each Network develop its mission statement and a mutual aid

agreement. As stated above, membership in a Disaster Response Network constitutes a commitment by an organization to make disaster preparedness and staff training an administrative priority. Once a Network is established we encourage its members to meet with their local county and city emergency managers, as cooperation with first responders is essential in the event of a major disaster.

### **NETWORK FUNDING**

Each network will have to determine the funding commitment of its members. This will vary from network to network and depend upon the local situation, but some financial commitment on the part of the members is assumed. The San Diego/Imperial County Libraries Disaster Response Network (SILDRN) has a commitment of \$500 for initial membership with renewal fees of \$100 to \$300 depending upon institution size. SILDRN renewals cover three years. The Vermont Museum and Gallery Alliance has membership dues of \$75 or \$50 depending upon the size of the museum's budget. Some additional sources for funding networks are noted under State Wide Services to Support County Disaster Response Networks (see #5). Membership fees will be used for paying for disaster recovery services and stock a disaster recovery supply cache, for training, or other network expenses.

### **MODEL MISSION STATEMENT FOR A COUNTY DISASTER RESPONSE NETWORK**

The \_\_\_\_\_ County Disaster Response Network helps archives, historical societies, libraries, museums, and other heritage organizations in \_\_\_\_\_ County to respond to disasters affecting cultural resources and collections. Members help each other by providing advice, support and/or actual recovery assistance. Membership in the Network constitutes a commitment by an organization to make disaster preparedness and staff training an administrative priority.

The objectives of the Network are:

1. To promote awareness of potential disaster situations in \_\_\_\_\_ County and measures that members can take to prevent disasters;
2. To assist member organizations in the development of their disaster and collection salvage plans;
3. To facilitate or organize workshops and seminars to help members acquire the expertise needed to cope with disasters;
4. To prepare and disseminate to any interested archive, historical society, library, museum or other heritage organization lists of local preservation and disaster services, supplies and suppliers, and resource persons, etc. to supplement statewide and national resources;
5. To acquire, on a cooperative basis, supplies and equipment to support the disaster preparedness and collection salvage programs of member organizations;
6. To set up subcommittees and task forces to deal with specific, identified problems;
7. To facilitate partnerships between members and local first responders and emergency managers before disasters in order to enhance cooperation and understanding;
8. To cooperate with other disaster response networks in Washington and encourage the development of similar networks in other Washington counties.

### **MODEL MUTUAL AID AGREEMENT FOR A COUNTY DISASTER RESPONSE NETWORK**

The Work Group developed a model mutual aid agreement (see Appendix 2-A). The Agreement is based on agreements of other Disaster Response Networks. The membership of most existing networks is library-based, so our model agreement had to address issues relating to cross-cultural county networks. An assumption of Network membership is that they will contribute financially to the Network. Although the concept of adjunct membership is presented in the model mutual aid agreement, each Network that is formed will need to address the issue of fees for smaller institutions. Some smaller institutions have limited funding or lack paid staff, but nevertheless will require services in the event of a disaster. A sliding fee scale or tiered membership structure may be suitable for these institutions. Each network will need to determine how to balance the needs of these institutions with the availability of network resources.

### **MODEL LIST OF DISASTER RECOVERY SUPPLIES**

The Work Group reviewed lists of supplies that are on the websites of existing Disaster Response Networks to identify supplies that networks may share in common. (See Appendix 2-B) The assumption is that each member institution will have supplies to meet its immediate needs in the event of a disaster. Supplies that are held in common may be items that are less frequently used or additional quantities to

supplement a member's own supplies in the case of a larger disaster. Since most existing Disaster Response Networks are library-based we are also attempting to identify supplies that may be unique to needs of museum object recovery. Each network will need to determine what supplies are most appropriate for their network.

### **RECOMMENDATIONS FOR STATEWIDE SERVICES TO SUPPORT COUNTY DISASTER RESPONSE NETWORKS**

1. The Washington Office of the Secretary of State provides a website for County Disaster Response Networks with the model statements and, as networks develop, links to their websites and links to other disaster planning workshops, e.g. the WESTPAS website.
2. As networks form, we recommend that a statewide "Washington Collections Emergency Response Team" (WCERT) be organized with representatives of the networks. Although this would be a relatively informal group we recommend that WCERT develop bylaws and meet at least annually. The Office of the Secretary of State might provide some assistance to WCERT.
  - a. WCERT would develop basic guidelines on what to include in a database of statewide resources (equipment, supplies, and expertise) for disaster planning and recovery. In developing such a database WCERT should consider existing resources, e.g. the Balboa Art Conservation *Washington Guide to Emergency Preparedness Resources* [http://www.bacc.org/res\\_pub.htm](http://www.bacc.org/res_pub.htm) and *The Disaster Mitigation Planning Assistance Website* <http://matrix.msu.edu/~disaster> at the Library of Congress, which is searchable by state. Any databases developed in Washington should be linked to the WCERT website. Some participants in WESTPAS workshops have identified local resources in developing their plans.
  - b. WCERT could refine the Model List of Disaster Recovery Supplies and the other model statements.
  - c. *WCERT should explore how to develop financial assistance for the county Disaster Response Networks and any statewide activities WCERT may initiate. Possible sources of funding might be Washington State Library LSTA funds, insurance companies active in the State, the Department of Homeland Security, and the National Endowment for the Humanities Preservation Assistance grants for smaller institutions* <http://www.neh.gov/grants/guidelines/pag.html>. *Grants might fund disaster training and county network supplies and equipment.*
3. *The Washington Office of the Secretary of State and/or the Washington Office of Financial Management Risk Management Division should explore a statewide agreement with an emergency recovery service.* The Massachusetts Board of Library Commissioners has a contract with Munters Moisture Control to provide freezing and drying facilities for large quantities of damaged materials. This service is available to public libraries but only upon authorization by designated Board or Northeast Document Conservation Center staff to a limit of \$25,000. This contract has been designed so that municipalities may contract with Munters for services beyond those stipulated in the contract, if that becomes necessary, without initiating a new bidding process. Montana has negotiated a similar agreement with Belfor USA.
4. WCERT and the Office of the Secretary of State should stay apprised of COSTEP [http://statewideplan.pbworks.com/brochure\\_COSTEP.pdf](http://statewideplan.pbworks.com/brochure_COSTEP.pdf), an IMLS funded project to develop a framework that will help states create customized emergency response plans for their states. Pilot projects are underway in Massachusetts and New Mexico.

### **IMPLEMENTATION**

Until WCERT is established, an informal statewide planning group should be established to help counties form networks. Members of the C2C Work Group on Collaborative Disaster Planning can help to identify individuals in their counties who can begin to explore the development of county Disaster Response Networks. Institutions that have completed WESTPAS PreP Plans are good candidates for networks. The importance of networks will be emphasized at WESTPAS and other disaster planning workshops. To aid in the development of the Networks a high priority should be placed on developing a website with the model statements.

**APPENDIX 2-A**  
**MODEL MUTUAL AID AGREEMENT FOR A COUNTY DISASTER RESPONSE NETWORK**

This Mutual Aid Agreement (“Agreement”) is made and entered into by and between the undersigned libraries, archives, museums, and related heritage organizations in \_\_\_\_\_ County, whose director or chief executive has signed this Agreement (“Parties”) and is effective on Month, Day, Year.

The Agreement serves as a framework in which to share expertise, experience and mutual assistance efforts with the goal of mitigating damages that could occur in the face of a disaster, and thereby impact the operations of the Parties or a specific Party.

Nothing in this Agreement will be deemed to create a contract, legal agreement, employment relationship, partnership (or fiduciary relationship) among the Parties. No party to this Agreement shall be liable for any action spoken, written or taken.

**RECITALS**

WHEREAS, the Parties are libraries, archives, museums, and related heritage organizations located in or near \_\_\_\_\_ County, Washington;

WHEREAS, each Party has identified disaster recovery personnel or a designated volunteer, all of whom have authority to perform disaster recovery services to the respective agency or institution by which they are employed or retained as a volunteer;

WHEREAS, the Parties agree that it is not be economical for any individual Party to purchase, store, and maintain all of the supplies and equipment that would be needed to cope with a major disaster; and

WHEREAS, each Party desires to provide to, and receive from, the other Parties’ disaster recovery assistance through participation in the \_\_\_\_\_ County Disaster Recovery Network (“The Network”) in the circumstances described in this Agreement; and

WHEREAS, it is agreed that mutual disaster recovery assistance would be beneficial to all Parties hereto:

NOW THEREFORE, it is agreed as follows:

**Governance.** The Network is governed by a steering committee. Each Party will appoint one member to the steering committee. A Party may change its appointed steering committee member at any time upon written notice to the other Parties. The steering committee will be responsible for general administration of Network policies and programs. It will also be responsible for operational decisions regarding the Network, including:

1. Recommending the amount of fees, if any, that should be assessed of the Parties and the date by which such fees must be paid;
2. Deciding how to utilize the Network’s membership fees or in kind contributions by the Parties;
3. Obtaining and monitoring the level of disaster recovery supplies purchased by the Network via the Parties’ membership fees; and
4. Determining the level of aid, assistance, and supplies to be provided to adjunct members and non-members if such aid is requested.
5. Approving requests for adjunct Network membership.

Decisions of the steering committee will be determined by a majority vote of the members voting on any given decision.

**Membership.** Membership includes the following requirements: commitment of membership fees in the amount of \$Fee to be paid annually by date; signing of the Mutual Aid Agreement; appointment of a staff member to the Steering Committee.

Libraries, archives, historical societies, museums, or other heritage organizations located within \_\_\_\_\_ County, but without the personnel or finances to become members of the Network may apply for adjunct membership. Adjunct members may appoint one non-voting representative to the steering committee. Adjunct members may request personnel assistance, disaster recovery supplies, and financial support from the Network as needed.

**Membership fees.** In consideration for participating in, and benefiting from, the Network, each Party will pay the Network membership fees in the amount of *\$Fee* annually and by *date*. A Party may pay the membership fees via in-kind contributions at the discretion of the steering committee. If a Party fails to pay the membership fees in a timely manner, it may not benefit from the rights set forth below until such fees have been paid.

**Disaster Recovery Assistance.** In the event of a disaster that cannot be conveniently or expeditiously met with a Party's disaster recovery personnel, the Party experiencing the disaster may request assistance from the disaster recovery personnel of the other Parties, which will be provided at the discretion of each such Party. The extent and duration of the assistance provided by one Party for another Party under this Agreement will be negotiated by the Parties according to the needs of the situation. No Party will be required to pay any compensation to any other Party for services rendered hereunder, the mutual advantages and protection afforded by this Agreement being considered adequate compensation to all of the Parties.

No Party will be liable for any action taken by its personnel in good faith or at the direction of the Party for whose institution assistance is rendered in the course of performing disaster recovery services pursuant to this Agreement.

**Disaster Recovery Supplies.** Using the Parties' membership fees, the Network maintains disaster recovery supplies and equipment deemed necessary for salvaging collections ("Supplies"). The Supplies will be stored in storage containers in predetermined locations, as identified on the Network's Web page at *Web Address*. The Network will maintain the storage containers and will pay for such maintenance with the Network's membership fees. If a Party on whose property a storage container is stored withdraws from the Network, the storage container will be moved to a new location at the Network's expense.

In the event of a disaster that cannot be conveniently or expeditiously met with the disaster recovery supplies held locally by a Party, the Party may access the Supplies in the Network's storage containers. A Party experiencing a disaster shall take no more than the amount of Supplies reasonably necessary to meet its immediate disaster recovery needs and will replace any Supplies withdrawn from the Network's storage containers within 90 days of removal.

**Term and Termination.** This Agreement commences on the effective date set forth above and continues indefinitely, unless terminated by a majority vote of the steering committee. Notwithstanding the foregoing, any Party may withdraw from the Network and terminate this Agreement with respect to itself at any time, effective upon 30 days written notice to each of the other Parties. None of the Parties will incur any liability to any other Party by reason of such termination. The terminating Party has no right to the Supplies it may have contributed to the Network.

Upon termination of the Network, the containers and the Supplies contained therein will be either sold and the net proceeds disbursed in the same proportion as the value of their respective contributions (including Supplies and membership fees) or distributed in kind to the Parties.

IN WITNESS WHEREOF, the undersigned have caused this Agreement to be executed by their respective authorized representatives.

**APPENDIX 2-B  
MODEL LIST OF DISASTER RECOVERY SUPPLIES**

1. Acetone
2. Alcohol
3. Black permanent markers, broad tip
4. Broom
5. Bucket, white with lid – 5 gal.
6. China marker (waxed pencil)
7. Cleaner, Simple Green
8. Clipboards
9. Clothes line, polyester
10. Clothes pins, plastic
11. Cords, nylon
12. Crate, plastic storage – 12 gal.
13. Dehumidifier
14. Document cleaning pads
15. Dust masks
16. Extension cord, 14 gauge
17. Fan
18. First aid kit
19. Flashlight, some with batteries, some handcrank
20. Flashlight, lantern, with batteries
21. Glasses, safety
22. Gloves – latex
23. Gloves – leather
24. Gloves – non-latex
25. Hardhat
26. Headlamps and batteries
27. Index cards
28. Knives, utility
29. Labels, removable
30. Lights, string Lite-A-Site with extra light bulbs
31. Paper – freezer (white, waxed side)
32. Paper, pads, lined
33. Pencils, #2, sharpened
34. Pens, black
35. Plastic sheeting, 2 mil
36. Post-it notes
37. Rags, cotton knit or shop rags, terry cloth
38. Rescubes, ProText
39. Respirator(s)
40. Rope, nylon
41. Scissors
42. Shrink wrap
43. Sponge, cellulose
44. Sponge, smoke-off
45. Spray bottle (for Simple Green)
46. Staple remove
47. Tape – caution “Do Not Enter”
48. Tape gun
49. Tape, clear, packing or 3M plastic sealing tape
50. Tape, duct
51. Tape, electrical/plumbing
52. Tarp, polyethylene 8’x10’, silver brown color
53. Tool kit, hammer, screw drivers, etc.
54. Vacuum, wet/dry
55. WD-40
56. Generator and propane fuel for larger locations
57. Sump pump, portable for larger locations

**Appendix 3:  
Sustainable Institutional  
Preservation Program  
Work Group Report**

## **Final Report**

### **Sustainable Institutional Preservation Programs Work Group**

**May, 2009**

#### **Work Group Members:**

- Stephanie Lamson, University of Washington Libraries/Preservation (Facilitator)
- Tamara Georgick, Washington State Historical Society (Writer)
- Chris Bee, Monroe Historical Society
- Mary Bowlby, Tacoma Historical Society Exhibit Center
- Loretta Greene, Sisters of Providence & Providence Health & Services
- Joseph Kalama, Archives, Nisqually Tribe
- Barbara Minard, Columbia Pacific Heritage Museum
- Ann Nez, University of Washington Law Library
- Megon Noble, University of Washington, Burke Museum
- Kirsten Schober, Kirkman House Museum
- Erin Whitesel-Jones, Washington State Archives
- Alicia Woods, Washington State Parks

#### **INTRODUCTION**

All archives, historical societies, libraries, museums, and cultural heritage organizations of all sizes share the responsibility of preserving their collections to educate and inspire future generations. The components of a successful and sustainable institutional preservation program may vary depending on the size and nature of the institution but the development of a program is feasible for any institution committed to the stewardship of its collections. At its broadest and most effective, preservation encompasses all actions and policies designed to prolong the useful life of collections.

At minimum, a preservation program consists of the following activities: preservation planning, environmental control and proper storage, staff and user education in care and handling, disaster planning, conservation, reformatting, and security. In addition, an institution must provide stable funding and assign a staff member responsibility for preservation.

For example, a model small public library preservation program might consist of all of these activities with a focus on funding for commercial binding and dust jacket protectors, in-house book repair, and occasional reformatting to create surrogates for rare and fragile materials. A portion of one staff member's time might be devoted to coordinating and monitoring these efforts.

A model large academic library might consist of the same core activities but be staffed with a full-time preservation librarian responsible for coordinating the efforts of a binding supervisor, conservator, reformatting librarian, and additional library technicians. Funding might focus on commercial binding, conservation, preservation replacement, and reformatting. Reformatting might include dedicated funds for microfilming local newspapers and other high-use and/or rare and fragile materials as well as for reformatting of audio, moving image, and photographic materials. Digitization and digital preservation, shelf preparation, and mass deacidification might also be components of a strong academic library preservation program.

Although both the small public library and large academic library programs are potentially very different in size and scope, they both address the basic preservation needs of their collections. Similarly, archives, museums, historical societies, and other cultural heritage institutions will also have preservation programs of different sizes and scopes but they will include the same core activities although perhaps with different emphases. For example, a museum might emphasize conservation over reformatting because of the nature of its collection.

Many institutions see preservation as a set of specific activities or a drain on resources rather than a collection of integrated policies and activities that promote the fiscally responsible management of

collections. Yet preservation activities can be integrated into current workflows with little or no cost and considerable economic benefit. For example, proper handling of materials during cataloging or careful shipping of materials on loan both decrease the risk of damage with little or no additional cost to the institution. A preservation program is within the reach of any cultural heritage institution, whatever its size or type, provided that there is a long-term institutional commitment.

### **SUPPORT FOR INSTITUTIONAL PRESERVATION PROGRAMS: FIVE COMPONENTS**

The work group identified five components that a statewide plan could provide to support institutional preservation programs: **assess, train, model, fund, and inform**. The group as a whole felt that the Washington Preservation Initiative (WPI) was quite successful in its support and development of institutional preservation programs and would like to see a similar effort continued and marketed more widely. When possible, the work group provided multiple options within each category depending upon the level of financial support that a statewide plan could commit.

#### **1. ASSESS: PRESERVATION SURVEYS AND ASSESSMENT**

Effective preservation planning and program development requires a preservation assessment to establish preservation needs and priorities. A successful preservation survey often identifies several problems that can be solved quickly with current staffing and resources while also identifying other short-term and long-term goals. Whether or not an institution drafts a formal preservation plan following a survey, the majority of institutions (77.6%) implement some preservation survey recommendations within six months (Brown 2006, 60).

The WPI funded approximately 15 general and/or collection specific preservation assessments between 2003 and 2005 for a wide range of cultural heritage organizations from public, community college, and university libraries to ethnomusicology archives and tribal collections. Awareness of the WPI grants spurred at least two additional libraries to contract for preservation surveys using other funds (Clareson 2006, 2) and several libraries reported that these assessments were of great benefit, offering a blueprint for future preservation activities. In some cases, the surveys enabled institutions to successfully lobby for additional funding from their administrations and to secure federal preservation grants (Clareson 2006, 3).

Several websites offer excellent introductions to preservation surveys (California Preservation Program Preservation Needs Assessment, <http://calpreservation.org/management/needs-assessment.html> and NEDCC's Preservation Education Curriculum on surveys and assessments, <http://www.nedcc.org/curriculum/lesson.class7.overview.php>). Funding specifically for preservation assessments is also available from the Institute of Museum and Library Services and Heritage Preservation Conservation Assessment Program (CAP) and the National Endowment for the Humanities Preservation Assistance Grant (PAG) program.

#### **RECOMMENDATIONS:**

- Support the development of institutional preservation programs and the preservation of cultural heritage collections by providing competitive grant funding for preservation assessments similar to the WPI Assessment or Competitive Preservation Grants. Additional resources, such as environmental monitoring equipment, could be made available to support assessment (or re-assessment) of collection storage conditions. [high impact, high cost]
- At minimum, provide a list of resources for undertaking preservation assessments on a website. Resources might include: general survey information, survey tools, potential consultants (like Regional Alliance for Preservation Centers), grant opportunities, and a list of local institutions that have completed preservation assessments. Many in the work group pointed out that the perspective of an experienced outside consultant can be very useful and more persuasive to administrators. [medium/high impact, low cost]

#### **2. TRAIN: PRESERVATION TRAINING**

Significant damage can occur when staff and users are not fully aware of how to care for collections. The HHI reports that “70% of institutions need additional training and expertise for staff caring for their collections” (Heritage Preservation 2005, 8). Within Washington State, 45% of those surveyed

said that statewide preservation services needed to include ongoing subsidies for preservation workshops; travel and registration costs were considered significant barriers to attendance (Clareson 2004, 13).

From 2003 to 2006, WPI offered thirty-six free preservation workshops. The *WPI Final Report* noted that several respondents found the workshops to be very successful and that “No other continuing education program has had this great of a reception in the past ten years.” Other respondents noted that repeating workshop offerings in the future would be useful as well as more in-depth or advanced workshops (Clareson 2006, 5).

While there are many sources for preservation workshops (like those offered by the Regional Alliance for Preservation Centers and other national organizations or the currently funded WESTPAS workshops on disaster planning), the lack of a RAP Center in the Pacific Northwest has made continued preservation education more challenging. Distance learning might help somewhat but some preservation training is best done with a hands-on component.

### **RECOMMENDATIONS:**

- Continue to offer free or heavily subsidized preservation workshops throughout the state. Repetition of some very popular, hands-on workshops like basic book repair (Clareson 2006, 5) would be useful as well as creating a sequence of workshops that build upon one another to provide institutional preservation staff with knowledge of both core activities and the preservation needs of a range of formats (from architectural drawings to archaeological objects to audio). [medium/high impact, medium/high cost]
- At minimum, notify individuals of available preservation workshops available locally or via distant education by a listserv (such as PreserveNW) and/or website and provide a list of local individuals and institutions with preservation expertise willing to provide some training opportunities. Training opportunities offered in concert with local conferences might increase the attendance of those living in more remote locations. [medium/high impact, low cost]

### **3. MODEL: MODEL PROGRAMS AND POLICIES**

A key area of concern identified in the *WPI Final Report* was the “development of workflow, staff time, and staff funding to do preservation work at individual institutions” (Clareson 2006, 6). Respondents were particularly interested in preservation staffing scenarios for smaller institutions.

In *The State of Preservation Programs in American College and Research Libraries*, a survey of these institutions also found a “hunger for practical advice and assistance based on proven approaches.” The study recommended focusing attention on pragmatic approaches and tailoring preservation knowledge and techniques to targeted audiences including “assembling profiles of institutional practices and success stories at peer institutions” as well as “identifying preservation benchmarks appropriate to a particular group of institutions” (Kenney and Stam 2002, 8-9).

While preservation assessments and training can provide practical advice, often comparing preservation programs at institutions with similar preservation needs can be very useful in determining strengths and weaknesses. Sharing this information can simplify the development and refinement of preservation programs, policies, and workflows. Some potential model institutions identified by the work group were the Wing Luke Asian Museum, Nordic Heritage Museum, Center for Pacific Northwest Studies at Western Washington University, Everett Public Library, Washington State Library, and University of Washington Libraries, although there are many others.

### **RECOMMENDATIONS:**

- Identify a few institutions of varying types and sizes with established preservation programs to provide examples of how preservation can be integrated into an organization and make these available on a website. Provide practical information about policies, staffing, and workflow. [medium impact, low cost]
- Provide a list of resources that discuss adapting preservation programs to a wide range of institution types and not simply large institutions with conservators or other full-time

preservation professionals on staff (for example, resources like *The Preservation Program Blueprint* and *Preservation Strategies for Small Academic and Public Libraries*). [medium impact, low cost]

#### **4. FUND: COOPERATIVE DISASTER PLANNING & GRANTS FOR COLLECTION PRESERVATION PROJECTS**

The HHI Report found that 77% of institutions did not specifically allocate funds for preservation in their budgets (Heritage Preservation 2005, 12). The *WPI 2004 Preservation Planning Survey* found that approximately 30% have no funding for preservation and 77% indicated that only 1% or less of the library's budget was allocated for preservation. When asked the dollar amount, 43% said the amount was zero (Clareson 2004, 4). The survey also found that 46% believed statewide services needed to include both support for preservation grants and disaster planning and recovery assistance (Clareson 2004, 13).

WPI awarded 31 competitive grants for specific preservation projects from 2003 to 2006 for a total of \$444,821. A wide range of preservation projects were funded, including: the preservation of documents from the Nipo Strongheart, Bob Pace, and Helen Schuster special collections at the Yakama Nation Library; the installation of UV-filtering film to reduce light damage to murals and collections at the Centralia College Kirk Library; and preservation of moving image materials by eleven institutions in the collaborative Washington Film Preservation Project.

Respondents to the WPI Program Impact Survey indicated that the availability of actual funding for preservation projects gave Washington's cultural heritage institutions an "unprecedented opportunity" to advance preservation (Clareson 2006, 3). National funding can be highly competitive and the Pacific Northwest is lacking in infrastructure (such as a local RAP Center and experienced vendors) that helps make other areas of the U.S. more successful in securing grants. Some small institutions are not even eligible for federal grants since they do not have the required staffing.

The work group and the two WPI reports also stressed the importance of cooperative disaster planning to institutional programs. The *WPI 2004 Preservation Planning Survey* found that 30% of respondents had experienced a disaster that damaged materials in the past five years and 67% had no written disaster plan. Assistance with disaster planning and recovery was one of three services of interest to nearly half of the survey respondents (Clareson 2004, 11-12).

#### **RECOMMENDATIONS:**

- Support the development of institutional preservation disaster planning and reduce the risk of damage to collections by funding collaborative disaster planning (see the work of the Collaborative Disaster Planning Work Group). [high impact, high cost]
- Provide competitive grant funding similar to the WPI Assessment and Competitive Preservation Grants to support the development of institutional preservation programs and the preservation of cultural heritage collections. [high impact, high cost]

#### **5. INFORM**

One theme mentioned within the first four components was the need for preservation information. The *WPI 2004 Preservation Planning Survey* found that 59% of respondents want a place to contact for preservation information (Clareson 2004, 12).

The *WPI Final Report* reinforced this need. It was noted that most institutions do not have preservation experts on staff and that more information could be put "on the PreserveNW listserv and provide deeper information on a Web Page, such as information on vendors and copies of existing disaster plans, that would be helpful to all constituents" (Clareson 2006, 7). The work group felt that the website should be linked from the Washington State Library (<https://www.secstate.wa.gov/library/libraries>), Washington Museum Association (<http://washingtonstatemuseums.org>), and the Department of Archaeology and Historic Preservation (<http://www.dahp.wa.gov>) to best share information with a range of cultural heritage institutions.

**RECOMMENDATIONS:**

- Provide a website and use the PreserveNW listserv as an information clearinghouse for preservation information. [high impact, low cost]
- Publicize the existence of both the website and listserv widely; 26% of respondents in the *WPI 2004 Preservation Planning Survey* were not aware of the PreserveNW listserv. [high impact, low cost]

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**Appendix 4:  
Sustainable Statewide  
Preservation Program  
Work Group Report**

# **Final Report**

## **Building a Sustainable Statewide Preservation Program for Washington State**

**May, 2009**

### **Work Group Members:**

- Eric Palo, Renton Technical College Library (Facilitator and Writer)
- Brenda Abney, Wenatchee Valley Museum
- Nicolette Bromberg, UW Visual Resources
- Brian Carter, NW African American Museum
- Dave Nicandri, Washington State Historical Society
- Nancy McKay, Highline Historical Society
- Eric Taylor, 4Culture
- Julie Viggiano, Seattle City Archives
- Jan Walsh, Washington State Library

### **INTRODUCTION**

Sustainable statewide preservation programs have evolved where certain factors exist. These include continual and adequate funding, permanent staffing, an educational component, and the ability and resources to run a number of programs.

### **WHAT OTHERS HAVE DONE**

The task force began its work by investigating what several other states have been doing in statewide preservation. Documentation about some of the efforts in eight other states was reviewed.

Those states were:

- Massachusetts
- New York
- Delaware
- Ohio
- Iowa
- California
- New Mexico
- North Carolina

From that list, four states (North Carolina, Iowa, New Mexico, & California) were selected for more in-depth review. Preservation leaders in those states were interviewed by telephone. Notes from those conversations are available.

### **GENERAL FINDINGS FROM OTHER STATES**

Some states have been successful in getting regular funding for preservation from a state agency or their state legislature. However, such funding is hard to achieve and continuing funding can be threatened.

A key factor in successful statewide preservation efforts is having a core of dedicated people. Without this core statewide efforts do not have sustainability.

Dedicated people might mean paid staff members. It can also mean one or two key volunteers or an active volunteer board or committee. Successful board run organizations have had individual members taking responsibility for accomplishing specific tasks.

Most states, even many of those with a state funded operation, rely on one or two key individuals to keep preservation efforts alive and moving forward. Most states reported having concerns about sustaining

preservation activities if/when the dedicated individual leaves the stage. Statewide efforts in New Mexico and North Carolina, for instance, both had significant setbacks when staff moved on.

Independent non-governmental organizations with dues paying members can be successful in statewide efforts. These independent organizations still need institutions to allow their key volunteers to use their official positions as a base from which to do their extra activities. Iowa is an example of where this institutional support has facilitated a successful program and New Mexico is an example of where lack of such support has hampered efforts.

Because of the dues income, these organizations have a base level of funding to sustain some continuing activities. It was reported that payment of dues also increases institutional buy-in to the organization's activities. The basic funding has been useful in getting preservation grants from other agencies.

Many states have found that workshops on preservation topics are a very popular with members of the cultural heritage community. Disaster preparedness and response seem to be the single most popular workshop topic. Disasters are a topic that applies to all types of cultural heritage institutions. The creation of disaster response groups are also a valuable activity.

WESTPAS (Western States and Territories Preservation Assistance Service) is a resource available to institutions in Washington. It was recommended that we keep in mind what it is doing as we are planning.

All states are making an effort to include a broad range of cultural heritage institutions in their preservation efforts. Some have a long track record in this and some are just starting. To be successful in this effort, it is important to be sure that any organization created is not seen as too library centric.

### **SUGGESTIONS FOR WASHINGTON STATE**

Based on the investigations of what other states are doing and on our own discussions, the task force recommends the following to develop a sustainable statewide preservation effort in Washington State.

#### Seek Dedicated Funding:

- Lobby the Washington State Library to include preservation as an LSTA funding priority.
- Lobby the Washington State Legislature to allocate new funding for statewide cultural heritage preservation.
- But realistically, substantial funds are not likely to be made available in the near future, particularly in light of the current budget situation.
- The lobbying activity, however, is not without value, even if not immediately successful. Ten years, or more, is not an unusually long time to get funding for a new program. The continuing lobbying effort, if well handled, will build support in the long run.

#### Go Independent:

- Preservation efforts can't wait for state funding.
- Consider creating an independent non-profit dues based membership organization to build and sustain a statewide effort.
- Have a voluntary dues structure such as that used by Iowa or North Carolina.
- Have the entry level fee low enough to encourage small organizations to join.
- Have enough higher level categories that the better funded institutions can pay more (if they want to).

#### Workshops/Disaster Prep:

- The first activities after organization could be workshops (coordinated with WESTPAS) with early efforts focused on disaster preparation.
- Disaster preparation is very applicable to all types of cultural heritage institutions.
- It is likely that every institution will have some "disaster" event, probably small, like a water leak. It could, however, also be major like a fire, roof collapse, or an earthquake (all things that have happened to Washington State cultural heritage organizations in the recent past).

- Preparing local institutions for disasters is probably the single most important thing that we could do.
- Another useful activity might be to compile list of appropriate supplies and suppliers (local and national).
- Investigate having pre-negotiated blanket agreements with commercial firms in case of disasters (cold storage, disaster response firms, etc.)
- Consider developing disaster response groups as a longer term goal.

Involve Others:

- Investigate connections and/or cooperation with institutions in Oregon and Idaho. In some areas of the state it may make sense for institutions to look across the state border for partners to cooperate with. Our statewide organization should allow for, if not encourage, these connections.
- The group should also engage in outreach activities promoting the importance of preservation awareness and support. This is to build support in both the individuals on the front lines in organizations and with the managers and boards who set budget allocations. Connect with as many organizations as possible, including:
  - Historical societies
  - Library groups
  - Museums
  - Archives
  - Indian tribes
  - Public agencies
  - Professional membership groups

**Appendix 5:  
Roster of Steering Committee Members**

## Roster of Steering Committee Members

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**Appendix 6:**  
**List of Websites from Consultant's Report**

## List of Websites from Consultant's Report

### ***Narrative***

1. Washington State Connecting to Collections  
<http://www.secstate.wa.gov/library/libraries/c2c/>
2. "Swimming Upstream: Cooperatively Preserving Collections in the Pacific Northwest"  
<http://www.lib.washington.edu/Preservation/swimmingupstream.html>
3. A vision for preservation in the Pacific Northwest  
<http://www.lib.washington.edu/Preservation/vision.html>
4. A regional preservation email discussion list, Preservenw, hosted by the University of Washington  
<http://www.lib.washington.edu/Preservation/preservenw.html>
5. 2004 OCLC mail survey and targeted telephone interviews  
<http://www.secstate.wa.gov/library/libraries/projects/presSurveySummary2004.pdf>
6. 2006 survey on the impact of WPI  
<http://www.secstate.wa.gov/library/libraries/projects/presTomsFinalSurveyReport.pdf>
7. Activity website  
<http://www.secstate.wa.gov/library/libraries/c2c/>
8. The full program  
<http://www.secstate.wa.gov/library/libraries/c2c/program.aspx>
9. Iowa model for consortium  
<http://web.grinnell.edu/individuals/stuhrr/icpc/index.html>
10. North Carolina model for consortium  
<http://www.ncpreservation.org/index.html>
11. Massachusetts Board of Library Commissioners' statewide preservation specialist  
<http://mblc.state.ma.us/advisory/preservation/index.php>

### ***Appendix 1***

12. "Please Touch – It's Hands On for Historic Preservation"  
<http://www.preservationdirectory.com/preservationblogs/ArticleDetail.aspx?id=767&catid=4>
13. American Association of Museums advocacy page  
<http://www.speakupformuseums.org>
14. National Trust for Historic Preservation advocacy page  
<http://www.preservationnation.org/take-action/advocacy-center>
15. Connecting to Collections fundraising for preservation  
<http://www.imls.gov/collections>
16. The American Association for State and Local History (AASLH) advocacy page  
<http://www.aaslh.org/htopics.htm>
17. "The Gift of History"  
<http://www.aaslh.org/documents/GiftOfH.pdf>
18. SOS! (Save Outdoor Sculpture!)  
<http://americanart.si.edu/research/programs/sos>
19. Treasures of American Film Archives  
<http://www.filmpreservation.org>

### ***Appendix 2***

20. The Vermont Museum and Gallery Alliance adapted PreP plan  
<http://vmga.org/aboutVMGA/disaster.html>
21. WESTPAS website  
<http://www.westpas.org>
22. COSA records-related emergency training via Web and CD for state and local records  
<http://www.statearchivists.org/iper/index.htm>
23. Sample of an agreement with a local freezer to freeze wet items (as appropriate) in the event of a disaster  
<http://www.portals.org/members/coldstorage.doc>

24. Balboa Art Conservation *Washington Guide to Emergency Preparedness Resources*  
[http://www.bacc.org/res\\_pub.htm](http://www.bacc.org/res_pub.htm)
25. *The Disaster Mitigation Planning Assistance Website* at the Library of Congress  
<http://matrix.msu.edu/~disaster>
26. National Endowment for the Humanities Preservation Assistance grants for smaller institutions  
<http://www.neh.gov/grants/guidelines/pag.html>
27. COSTEP  
[http://statewideplan.pbworks.com/brochure\\_COSTEP.pdf](http://statewideplan.pbworks.com/brochure_COSTEP.pdf)

### **Appendix 3**

28. California Preservation Program Preservation Needs Assessment  
<http://calpreservation.org/management/needs-assessment.html>
29. NEDCC's Preservation Education Curriculum on surveys and assessments  
<http://www.nedcc.org/curriculum/lesson.class7.overview.php>
30. Washington State Library  
<https://www.secstate.wa.gov/library/libraries>
31. Washington Museum Association  
<http://washingtonstatemuseums.org>
32. Department of Archaeology and Historic Preservation  
<http://www.dahp.wa.gov>
33. *Washington Preservation Initiative of the Washington State Library 2004 Preservation Planning Survey Report*  
<http://www.secstate.wa.gov/library/libraries/projects/presSurveySummary2004.pdf>
34. *Final Report: WPI Program Impact Survey Project for the Washington Preservation Initiative Program of the Washington State Library*  
<http://www.secstate.wa.gov/library/libraries/projects/presTomsFinalSurveyReport.pdf>
35. *A Public Trust at Risk: The Heritage Health Index Report on the State of America's Collections*  
<http://www.heritagepreservation.org/HHI/HHIsummary.pdf>