

Oklahoma Connecting to Collections Initiative

FINAL REPORT

March 1, 2008 – February 28, 2010

LG-41-08-0027

Program: National Leadership Grant: Connecting to Collections

Awardee: Oklahoma Department of Libraries

Partners: Oklahoma Museums Association
Oklahoma Historical Records Advisory Board
Oklahoma Historical Society

Project Name: Connecting to Collections: The Oklahoma Cultural Heritage Trust

Project Director: Susan Feller



Synopsis: The Oklahoma Connecting to Collections project was directed by the Oklahoma Department of Libraries, the Oklahoma Museums Association, the Oklahoma Historical Records Advisory Board, and the Oklahoma Historical Society. Over the two years of the project, representatives of cultural institutions, elected officials, funders, state agencies with similar missions, tribal cultural institutions, and members of the public worked together to assess the needs of Oklahoma collecting institutions. Information was gathered through a Public Opinion Survey, an Oklahoma Collections Care Needs Survey, three public meetings, eleven regional Cultural Summit Meetings, and a follow-up survey to prioritize needs and actions identified from Cultural Summit participants. At the conclusion of the planning project, much valuable information was gathered, greater awareness was created for the collection care needs of Oklahoma institutions, new volunteers were recruited, and an Action Plan was developed.

SUMMARY:

With a \$40,000 *Connecting to Collections* grant award, the Oklahoma Department of Libraries worked with the Oklahoma Museums Association, the Oklahoma Historical Records Advisory Board, and the Oklahoma Historical Society to assess the feasibility of establishing a new organization to help cultural institutions protect and preserve valuable collections. It was envisioned that the new organization would work to build strong public/private partnerships and collaborate on programs that include:

- Funding to support local and regional cultural projects and collaborations, as well as information about the availability of other funding opportunities;
- Marketing campaigns to increase public awareness of the needs of Oklahoma's cultural institutions; and
- Comprehensive and consistent training in collection care practices, including technical assistance to develop collection care plans and policies.

Over the two years of the project, considerable dialog evolved between the partnering organizations, representatives of cultural institutions, elected officials, funders, state agencies with similar missions, tribal cultural institutions, and members of the public. Information was gathered through a Public Opinion Survey, an Oklahoma Collections Care Needs Survey, three public meetings, six regional Cultural Summit Meetings, and a follow-up survey to prioritize needs and actions identified from Cultural Summit participants.

At the conclusion of the planning project, much valuable information was gathered, greater awareness was created for the collection care needs of Oklahoma institutions, new volunteers were recruited, and an Action Plan was developed.

In the final analysis, while a primary purpose of the Oklahoma Connecting to Collections project was to assess the feasibility of forming a separately incorporated membership-based organization to raise public/private funds for re-granting, it was determined that, due to the current economic climate, a separate organization should not be formed. Rather, activities will be overseen by a consortium of stakeholder organizations, membership associations, and state agencies. The unincorporated consortium/umbrella organization will continue under the name "Oklahoma Cultural Heritage Trust" and will oversee the implementation of the Action Plan that resulted from the Connecting to Collections project.

COLLECTION CARE/ORGANIZATIONAL PRIORITIES

Since 2003, the Oklahoma Department of Libraries (ODL), the Oklahoma Historical Records Advisory Board (OHRAB), and the Oklahoma Museums Association (OMA) have worked together to provide training, funding, and networking opportunities for Oklahoma's 650 museums, archives, and libraries. While it is recognized that these efforts have significantly strengthened the structure and collections-care practices of Oklahoma's cultural institutions, there remains a need to build sustainability and cohesiveness into the programs and services offered by the partnering institutions.

Various studies conducted since 2004 found that Oklahoma's cultural institutions, and the collections entrusted to their care, are facing serious challenges. Surveys conducted by OHRAB have found that 100% of organizations reported losing materials, either through theft, water damage, mold, pests, fire, or other reasons. The survey found that 50% of organizations do not have collection policies, 86% do not have disaster preparedness plans, and 74% do not have strategic plans.

When asked to identify and rank collection care priorities, institutions indicated their greatest priorities were to 1) improve preservation/conservation skills; 2) improve facility/storage conditions; 3) develop plans, policies, and procedures; 4) increase collections management through the use of technology; and 4) expand the size and scope of collections.

When asked to identify and rank organizational priorities, institutions indicated their key priorities were to 1) strengthen and diversify funding; 2) address all areas of marketing, from getting information out to the public to attracting visitors and reaching niche audiences; 3) improve the professional capacity of volunteers and staff members; 4) educate board members and donors on the workings of the museum and their roles; and 5) create a culture that appreciates and values archives, libraries, and museums.

Tied to each of the collection care and organizational priorities is the need for funding, not only for collections care but for all levels of operation. As one survey respondent indicated, "We want to devote resources to caring for our collections, but right now every available dollar is going to pay the electric bill and to keep the doors open."

PROJECT OVERVIEW

While it was the intent of the partners to focus only on developing a consistent source of funding for collection care, early on in the planning process it became obvious that a stronger case for support could be developed if the scope of information gathering was expanded. By drawing on the expertise of stakeholders, and listening carefully to their concerns, the Connecting to Collections project was expanded to address other key areas, including greater public awareness, more training, and cooperative conservation efforts.

The project was built around four premises:

- Oklahoma's unique history is documented in records and artifacts held by hundreds of institutions throughout the state.
- These records and artifacts serve as a way to pass on traditions, enhance learning, and engage the community.
- Ensuring the proper care of these items, and increasing public access to them, will raise awareness of Oklahoma's cultural offerings, will build appreciation for cultural institutions, and will enhance Oklahoma's image in the state and beyond.
- Significant efforts must be undertaken to preserve Oklahoma's cultural assets, which are being lost on a daily basis.

The key initiative investigated during the project was the development of an umbrella organization known as the Oklahoma Cultural Heritage Trust. It was envisioned that the Trust would:

- Build on the strength and existing programs of Oklahoma's leading cultural organizations and state agencies to establish a cohesive partnership for the purposes of providing resources to protect and stabilize Oklahoma's museum, library and archives collections;
- Call on a statewide coalition of individuals and organizations to be advocates for collection care, create a united voice, and establish the critical mass that is necessary to achieve and promote large-scale, long-term change;
- Work to increase public awareness of the condition and needs of Oklahoma's valuable collections and bring higher visibility to the work of the state's cultural institutions; and
- Leverage public and private funds as a means of addressing the long-term

protection, preservation, and care of artifacts, documents, records, and other cultural assets held in the collections of Oklahoma institutions.

The end result of the two-year planning project was the development of an action plan that addresses eight key areas (Funding, Public Awareness/Marketing, Staff/Board Development, Partnerships, Emergency/Disaster Preparedness, New Media/Digitization/Technology, Facilities, and Collections Care/Management). The plan prioritizes actions, makes assignments, identifies funding sources, and establishes timelines.

PROJECT ACTIVITIES

One of the first activities of the partners was to define tasks, timelines, and responsibilities. Early planning meetings resulted in the identification of key activities, including researching model programs in other states, hiring a planning consultant, identifying target audiences and developing databases, conducting a public awareness campaign, seeking meaningful input from stakeholders, assessing public opinion, and producing and disseminating reports.

1. Identify Model Programs

The first step was to research and analyze model programs in other states to determine if the models might be applicable to Oklahoma. Eight model programs were identified, with the Minnesota Legacy Amendment Arts and Cultural Heritage Fund and the Oregon Cultural Trust ranking at the top of the list.

- Minnesota voters passed a constitutional amendment creating a new 3/8-cent sales tax to support recreation, arts, history and cultural heritage projects, and other activities. Of the total proceeds from the sales tax, 19.75% are dedicated to the Arts and Cultural Heritage Fund. It is estimated that more than \$1.2 billion in programs and projects will be funded over the 25 year life of the tax.
- The Oregon Cultural Heritage Trust is supported by progressive enabling legislation (HB2923) that provides funding for Oregon's Trust. Sponsored by a bi-partisan group of legislators, it established a tax credit for direct contributions to the Trust. Additional funding comes from revenue for the sale of a "cultural" license plate and from the sale of state-owned surplus assets. The Trust distributes funds to local communities through competitive grants for projects of regional and statewide significance.
www.oregonculturaltrust.org

- The New York State Program for the Conservation and Preservation of Library Research Materials was developed through library legislation in 1984, and further developed in 1986 and 1990 into one of the nation's leading programs. Key to the success of the project is a discretionary grant program which provides funding up to \$30,000 annually for projects preserving research materials in cultural institutions. Funded projects include institutional preservation surveys, collection microfilming, improvement in collections storage areas through environmental monitoring, conservation treatments, and training. www.nysl.nysed.gov/libdev/cp/
- Nebraska became the first state to enact legislation establishing a cultural endowment to support the arts and humanities. In 1998, the Nebraska Legislature set aside \$5 million to stabilize and enhance cultural programs. The income from the fund is available for cultural programs when it is matched with new money.
<http://www.nebraskaculturalendowment.org/donors.asp>
- The Ohio Preservation Council's long-standing efforts focus on education, with bi-annual workshops and symposia, as well as a strong advocacy program, keeping preservation in the public eye through vehicles such as posters publicizing preservation activity. <http://opc.ohionet.org>
- The Massachusetts Board of Library Commissioners program emphasizes the importance of environmental monitoring and control, offering loans of environmental equipment to all types of collection-holding institutions. Program provides training opportunities and emergency assistance, preservation needs assessments, and site surveys.
<http://www.mass.gov/mblc/advisory/preservation>
- The North Carolina Preservation Consortium sponsors annual conferences and workshops. <http://web.grinnell.edu/individuals/stuhrr/icpc/about.html>
- The Iowa Conservation and Preservation Consortium provides preservation information and education for libraries and museums.
- The Washington Preservation Initiative offers preservation workshops and funds grant projects. Librarians have hailed the program as one of the most effective Library Services and Technology Act (LSTA) funded programs in the state's recent history.
<http://www.secstate.wa.gov/library/libraries/projects>

2. Engage a planning consultant

Prior to commencing the project, partners sought to engage a consultant to help guide the process, assist in the development of surveys and interview questions, facilitate meetings, help analyze information, assess funding feasibility, and help write the strategic plan. The partners originally identified a consultant with ArtsMarket, Inc., the consultant who was responsible for helping develop the Oregon Cultural Trust. The final proposal received from ArtsMarket was for \$55,000 which far exceeded the \$40,000 provided through the IMLS Connecting to Collections grant. After several attempts to identify a planning consultant, it was determined that the partners would assume responsibility. Susan Feller, the Development Officer for the Oklahoma Department of Libraries and the project manager for the Connecting to Collections grant has 20 years of experience in planning large-scale projects, with an emphasis on developing statewide and regional initiatives. The Oklahoma Museums Association accepted the responsibility for planning the meetings. All partners participated in the development of the surveys and interview questions and the development of the strategic plan. Sherelyn Ogden, project director for the Minnesota Connecting to Collections project served as a volunteer consultant, helping draft meeting agendas and surveys.

3. Develop a comprehensive database of Oklahoma Cultural Institutions

Databases were gathered from the Oklahoma Museums Association, the Oklahoma Department of Libraries, the Oklahoma Historical Records Advisory Board, the Oklahoma Historical Society, and the Oklahoma Department of Tourism and Recreation. The databases were merged and purged of duplicates. Two comprehensive databases now exist, one with over 3,000 names and email addresses of individual staff members of archives, libraries, museums, and historical societies and one with 650 unique cultural institutions. An added value of the cultural institution database, which also includes a brief description of the organization and its holdings, is the production of a Directory of Oklahoma Archives, Libraries, and Museums that will be distributed to public and tribal libraries in hard-copy format and made available through the Oklahoma Department of Libraries and Oklahoma Museums Association websites free of charge.

4. Plan and implement a public awareness campaign

To generate awareness of the project, statewide media releases were distributed to 1,200 print and broadcast outlets in Oklahoma. Collateral materials consisted of a banner stand, 1,000 postcards, 5,000 posters, and 10,000 bookmarks. Materials were

distributed in white mailing tubes to 1,000 organizations and were available at the 2009 Cultural Summit Meetings and statewide conferences. To maintain a cohesive image with the national Connecting to Collections program, graphic elements for the project were aligned with those found on the Heritage Health Index Report. The Oklahoma Department of Libraries provided graphic services valued at \$3,200 and a local printer produced the materials at cost. Marketing materials may be found in Appendix 1.

An added boost to the public awareness campaign came when the Oklahoma Connecting to Collections project was one of four statewide projects honored by Creative Oklahoma, Inc., an organization of government, business, education, cultural, and civic leaders who are working to transform education, commerce and culture to meet 21st Century challenges. In certifying the Oklahoma Connecting to Collections campaign as a "Great Inspiration Project," Creative Oklahoma Board Chair Burns Hargis (President of Oklahoma State University) indicated the project was spotlighted because it "showcases Oklahoma's creative abilities and accomplishments and has the potential to increase the quality of life in our state."

To further promote the project, a dedicated website was developed and is available at www.culturalheritagetrust.org. During the early project development period, the website served as a central point for the public to learn about the goals and objectives of the project, provide input, volunteer, track progress, learn about regional meetings, and learn about what other states are doing to preserve cultural heritage. There is a possibility that the website will eventually be a clearinghouse for information on the care of collections, including information for individuals who wish to gift collections or items to cultural institutions. The University of Central Oklahoma contributed web development services equal to \$5,000.

5. Conduct a public opinion survey

To assess public support, a public opinion survey was available on the project website and was distributed at two public meetings. Results from the survey revealed there was strong support for an organization such as the Trust, with 86% of respondents supporting the concept, 12% indicating they needed more information, and 2% being undecided. There was no opposition. Most revealing, 100% indicated a belief that state government should provide support of at least \$1 per Oklahoma resident on an annual basis. Public comments include:

"To allow the depredations of time and exposure to destroy a link to our past cheats us all. It is time to take action."

"Funding for preservation of collections is important to developing vibrant

communities that appeal to visitors. Our state history, as well as our personal histories, is the foundation of our being; without a link to the past, we are but mere nomads in quest of fulfilling an unquenchable thirst."

"Historical collections excite and motivate each succeeding generation as to their place and contributions to Oklahoma. A consistent and sizable pool of funds should be made available."

"Oklahoma's rich variety of libraries, museums, and archives are not only a valuable resource for visitors and non-Oklahomans to learn about the state but also allow life-long residents to discover new things in their own backyard. These are treasures that must be preserved, not only for us but for the generations to come."

"History is who we are as a people and guides us to who we become. Objects connect us with the past. Oklahoma has a varied and colorful history. It should be kept for generations to come."

The public opinion survey may be found in Appendix 2.

While responses are no longer being sought, the survey instrument is available at:
http://www.surveymonkey.com/s.aspx?sm=WjrXLt2ewVaAUmiW8oW1Q_3d_3d.

6. Conduct an "Oklahoma Collections Care Needs Survey"

For the purpose of identifying, confirming, and evaluating needs of Oklahoma's collection institutions, a 28-question survey was developed and distributed to the 650 cultural organizations previously identified. The survey was based on past collections care needs surveys conducted by the Oklahoma Historical Records Advisory Board in 2004 and 2007, with a few questions drawn from the "Heritage Health Index Report." The final survey was closely modeled on the Minnesota Connecting to Collections survey.

A total of 286 institutions responded. A full report may be found in Appendix 3.

While responses are not actively being sought, the survey instrument for cultural institutions remains available online at:
http://www.surveymonkey.com/s.aspx?sm=seqk_2fMbQoV8GJullEbFm8w_3d_3d.

7. Host public meetings

Public meetings were held in western Oklahoma at the Southwest Genealogical Society meeting, in northeastern Oklahoma at the Oklahoma Museums Association annual conference, and in southeastern Oklahoma as a part of the reopening of the Museum of the Red River and at the Oklahoma History Museum in November. For the meeting in southeastern Oklahoma, Brenda Granger, director of the Oklahoma Museums Association prepared a presentation targeted to the general public. The presentation, entitled "Hold on to the Memories: Saving Family Treasures" was presented by consultant Sherri Vance. A copy of the presentation may be found in Appendix 5.

8. Host stakeholder meetings

To assess needs of Oklahoma's museums, libraries, and archives, in 2009 the Oklahoma Department of Libraries and the Oklahoma Museums Association sponsored six cultural summit meetings in strategic locations around the state. The purpose of the meetings was to gather input on threats/issues of concern to organizations and to collectively explore ways to most effectively start addressing identified needs. The meetings further informed stakeholders of national and state initiatives that may impact Oklahoma's cultural organizations and encouraged dialog between diverse cultural organizations.

Of note, participants in the Summit Meetings placed a high value on the opportunity for libraries, archives, and museums to convene around common issues. The Summit Meetings represented the first time many of the people were in the same room together, even though they served the same community and had common goals. This unanticipated outcome has resulted in the scheduling of another round of Cultural Summit meetings in 2010.

2009 meetings were held in Enid, Ada, Muskogee, Tulsa, and Oklahoma City. To seek input from tribes, an additional meeting just for tribal nations was held in centrally located Oklahoma City.

At the meetings, dynamic group discussion explored threats, priorities, resources, and methods of working together. More than 1,000 written and oral comments were received from the 263 participants.

Meeting packets consisted of an agenda, roster of attendees, discussion questions, the Oklahoma Collections Care Needs Survey Summary of Findings, the Heritage Health Index Report, and data sheets on Preserving the American Historical Record Initiative, the Federal Formula Grants for Museums Initiative, and the Oklahoma Connecting to

Collections Initiative. Materials from the meeting may be found in Appendix 6.

9. **Conduct a survey to prioritize initiatives identified by stakeholders.**

While the intended scope of the planning project was to assess the feasibility of developing a dedicated source of funding for the care for collections, as the partners listened to the concerns of stakeholders it became apparent that collection care needs extend beyond the need for funding, as evidenced by more than 1,000 comments received from the stakeholder meetings and surveys.

These comments were organized into eight areas and distilled into a manageable size. Key areas were:

1. Funding
2. Public Awareness/Marketing
3. Staff/Board Development
4. Partnerships
5. Emergency/Disaster Preparedness
6. New Media/Digitization/Technology
7. Facilities
8. Collections Care/Management

From the comments, a Cultural Heritage Preservation Plan, Phase II survey was developed and distributed to representatives of cultural institutions. The purpose of the follow-up survey was to give voice to the needs/solutions expressed by the stakeholders. Respondents to the survey were asked to prioritize the needs, identify if an identified need was already being addressed, and help with implementation.

The final report may be found in Appendix 4.

To view the survey, visit:

<http://www.surveymonkey.com/s.aspx?sm=moaHDCpKRDmCB3ArpOsIR8i8KRzad1FiSAbNIWc%2fDmo%3d&>

CONCLUSION

In the final analysis, it was the consensus of stakeholders that the Cultural Heritage Trust should not be a separately incorporated organization, but should operate under the auspices of the partnering organizations and be housed at a state agency such as the Oklahoma Department of Libraries. ODL was identified as the possible host agency since it has a long relationship serving the needs of archives, libraries, and museums and because of its experience with managing granting programs.

It was recommended that a formal structure be in place which assures representation from the state's leading providers of services to collecting institutions,¹ as well as stakeholder groups from throughout the state.

It was recommended that the umbrella organization work to enhance and promote existing services, that it oversee the work of task forces assigned to addressing and implementing the Action Plan, that it sponsor collaborative projects, that it provide an Oklahoma voice to various national initiatives, and that it work with members of the Legislature and other funding entities to secure funding to enhance and improve the collections of Oklahoma's archives, libraries, and museums.

¹ Oklahoma Department of Libraries, Oklahoma Museums Association, Oklahoma Historical Records Advisory Board, Oklahoma State Department of Education, Oklahoma Historical Society, Oklahoma Arts Council, Oklahoma Humanities Council, Oklahoma Department of Commerce, Oklahoma Department of Tourism and Recreation, and other organizations as identified.

NEXT STEPS (not in order of priority)

- Engage stakeholders at the March 2010 Cultural Summit II meetings in moving the Action Plan forward.
- Form Task Forces to start addressing the key initiatives. Members will be those who indicated a desire to work on a particular initiative through the Cultural Heritage Phase II survey. Other members will be recruited as needed and to insure statewide representation.
- Seek an official resolution from Governor Henry resolving that Oklahoma is committed to preserving its collections.
- Host a public awareness/advocacy day at the state capitol, during which the resolution can be presented and the public made aware of the needs of cultural organizations.
- Engage and enlighten members of the public through the sponsorship of public programs on caring for personal collections, i.e., a Preservation Road Show.
- Engage elected officials by calling upon them to appoint a statewide group of Cultural Heritage Advisors. Ask the Governor to appoint a representative from each of the five regions established by the Oklahoma Museums Association. Members of the legislature will be asked to appoint constituents from their districts. Representation will be sought from civic leaders, business leaders, religious leaders, corporate and foundation leaders, political leaders, educators, civic organizations, educators, and the media. The advisory council will form an advocacy network.
- Review actions that led up to the Minnesota Legacy Amendment and the Oregon Cultural Trust. Explore if the Oklahoma funding for cultural institutions initiative should be enacted through the legislative process or through a constitutional amendment by voters.
- Work with a major marketing and public relations firm to develop a pro bono public awareness campaign for the urgent needs of Oklahoma's collecting institutions. This step will depend on identifying a funding source to pay for the materials.
- Prepare and submit an IMLS Connecting to Collections Implementation Grant in support of top priorities (December 15).
- Continue hosting Cultural Summit meetings on a regular basis to hear recommendations from the work groups and to continue the current communication activities.

Respectfully submitted,

Susan Feller

Susan Feller
Project Director

