The 2010 South Carolina Heritage Health Index Survey Project
Grant # LG-41-09-0005-09

Clemson University Libraries and its partners—The South Carolina State Library, The South Carolina State Archives (SC Department of Archives & History), The Confederation of South Carolina Local Historical Societies and The Palmetto Archives, Libraries and Museums Council on Preservation (PALMCOP) ---received a grant in 2009 to conduct the South Carolina Heritage Health Index Survey, to assess the condition and preservation needs of our state’s public collections. This survey project was funded by the Institute of Museum and Library Services (IMLS) as part of Connecting to Collections, a national initiative to raise public awareness of the importance of caring for the treasures found in the collections of our country’s museums and libraries.

The primary goal of the South Carolina Heritage Health Index Survey was to gather information from cultural heritage institutions and collecting repositories statewide about their collections that allowed us to assess and evaluate the state of collections care and emergency preparedness. To this end, a list was compiled of every cultural heritage institution and collecting repository in South Carolina open to the public and possessing a permanent, non-living collection of unique materials for research and/or exhibit purposes. This list totaled 625. From this list, two hundred (200) institutions, representing archives, library special collections, historical societies, art museums, historic house museums, history museums, state historic sites and state parks, were selected to participate in this survey. The institutions selected to participate varied in type, size, budget and location, but are united in their mission to protect the artifacts and documents that tell the rich story of our state’s heritage while allowing users access to their collections.

THE DATA COLLECTION PROCESS. Data was collected through both a survey instrument and personal site visit conducted by a member of the survey project team. In the fall of 2009, an online survey instrument was developed for the convenience of respondents. By January 2010, points of contact had been identified at each of the 200 institutions selected to participate in the survey project. In March 2010, an email introducing the project, as well as the link to the online survey document was disseminated to the survey sites. Surveys were mailed, faxed or hand delivered to those institutions that did not have access to a computer. While participants were encouraged to submit their institution’s data online, they were also offered a PDF version of the survey with the option of printing out the survey and completing it by hand.

In March 2010, the project archivist began contacting each survey site to request an appointment to meet with the site’s administrator, collections manager and/or archivist. Site visits continued through August 2010. One hundred thirty-six (136) cultural heritage institutions were visited by the project archivist. The purpose of each visit was to offer personal guidance in completing the survey and answer questions regarding the survey instrument or process. The site visit was not intended for evaluation purposes; however the project archivist recorded unique information about each institution to supplement the data requested by the survey instrument. This additional information enabled us to develop of a comprehensive profile of each site, as well as documentation of the data collection process. Further, the project staff agreed that having the opportunity to meet the collections managers and archivists, and see each site’s collections and archives first hand—rather than just on paper—would not only enhance our understanding of the data being collected by the survey instrument, but ultimately would help in the development of stronger implementation funding proposals to IMLS for projects that will address the needs that the survey data identifies.

As noted previously, the project team contacted 200 cultural heritage agencies requesting participation in the survey project. The project archivist visited 136 sites. 116 completed surveys were collected. The potential number of surveys that could be collected was reduced from 200 to 168 for the following reasons:
- A number of sites identified by the project team were not eligible to be surveyed because although they are historical sites that are accessible by the public, they do not maintain collections.

- A number of sites identified to receive individual surveys do not operate independently, but as part of a consortium of sites whose collections were administered collectively by a single cultural heritage agency. Thus, a single survey was completed representing the collections of the multiple sites administered by the single cultural heritage agency.

- Certain sites identified to receive individual surveys were owned and operated by another site on our list. Both sites represent a single collection (e.g., the historical society was formed and functions solely to own, operate and manage a house museum and its collections).

- A number of sites identified no longer exist or are closed to the public indefinitely.

The data gathered through the survey instrument and the site visits communicated the scope and nature of the preservation needs of collections throughout South Carolina. To supplement the survey data, the site visits were of paramount importance in helping to better define and understand the unique challenges present at each site and view first-hand the direct impact these challenges have on basic collections management activities and operations.

**STRENGTHS AND DEFICIENCIES IDENTIFIED IN COLLECTIONS CARE**

South Carolina possesses diverse and unique cultural heritage institutions. Many serve the traditional museum role as dynamic cultural resource centers that collect, exhibit and interpret collections. The archival repositories collect, preserve and provide access to important archival material. While the state’s cultural heritage institutions may be defined using traditional definitions, most visited however, serve not only as a museum or archival repository, but as community centers and stewards of a town’s history, heritage and stories.

South Carolina’s cultural heritage institutions are administered by enthusiastic, dedicated and passionate people. There are many collections that are managed by professionally trained staffs. Others are managed exclusively by volunteers without formal professional training (it is important to note however, that because of the wide availability to online information and access to professional development workshops presented by regional and statewide organizations—such as PALMCOP, the South Carolina Federation of Museums, South Carolina Archival Association, and the South Carolina Department of Archives and History—many of these volunteers have received some professional training and possess a strong understanding of best practices in collections care, and are attempting to manage their collections in very professional ways). The bottom line: all are working to do the best they can with what they have. Many are even accomplishing significant things, with incredibly limited resources. **Regardless of the size, discipline or budget, there were significant needs identified by site administrators and collection managers during the site visits in three principle areas: (1) funding and funding development; (2) collections care and management; and, (3) professional development.**

1. **FUNDING and FUNDING DEVELOPMENT**

Improved access to funding was cited as the paramount need of every institution. While all are doing the best they can with what limited resources they have, all cited a direct correlation between funding and their ability to not only adequately manage and care for their collections, but allow for public access and use as well.

Many sites represented by the survey data are supported by small foundations—some with, and some without endowments—that are required to raise operating funds on an annual basis. Once funds are raised to pay basic utilities, there is often little left for funding any (let alone, adequate) staffing to manage and care for the
collections, purchase basic curatorial supplies or exhibition development materials, improve collections storage options, or provide for basic conservation. Even the institutions that receive local, state or federal government funding expressed concerns over budgetary restrictions.

There exists a concern and frustration for the perceived lack of understanding/comprehension by the public and funders as to the costs associated with administering cultural heritage institutions, adequately managing, maintaining, preserving and conserving collections, and providing secure public access to them. Many sites acknowledged a need for improved advocacy for funding — whether it be on behalf of repositories who already benefit from federal, state, county or local appropriations, or by individual sites working with their local governments, or their state or federal representatives to identify line-item funding or government sponsored granting programs/opportunities.

Advocacy programs have traditionally not been embraced by individual site administrators/curators, and actively used as a fundraising tool. Many sites cited a need to strengthen their community outreach and educate donors and the public regarding the true costs and importance of conservation and collections care, with the ultimate goal of increasing funding for their collections activities. It was also noted by many of these same institutions that it is incumbent upon our state's professional organizations which represent the museums and archival repositories to strengthen their advocacy efforts on behalf of their memberships. Museums and archives are integral to the cultural literacy of the state's population, and cultural heritage tourism, is a driving force for many local economies. (*Lake City example)

A majority of site administrators acknowledged a need for increased focus on grant development to specifically strengthen collections management activities, as well as support museum operations and program development activities. There were two principal reasons cited as to why grant writing is not a current priority: (1) a lack of time to write grant applications, especially with the understanding that there is the potential for failure (which translates to wasted time, especially because many applications are considered onerous); and, (2) lack of time and/or awareness of how to identify grants that will meet their specific needs, for which their institution is qualified.

2. **COLLECTIONS CARE AND MANAGEMENT RESOURCES**

During the site visits, many administrators, curators and collections managers expressed their frustration with the lack of financial, personnel and material resources which consistently compromised their ability to adequately manage and care for their collections. A significant number of sites acknowledged the absence of any type of inventory of their collections. Others reported that their inventories were outdated. Outdated or nonexistent planning documents impeded efforts to address long term management and conservation planning for the collections. A number of sites surveyed acknowledged placing a moratorium on collecting until they are able to gain a handle on their existing collections.

Environmental factors, specifically humidity variations, are recognized as significant threats to the collections housed in many of the sites surveyed. Environmental conditions vary significantly from site to site. Access to equipment and technology to monitor environmental conditions varies significantly from site to site. This project found that collections housed in contemporary structures designed and built with specific environmental controls in place appear to face as many challenges as those housed in historic structures that do not have adequate (and in some cases any) environmental controls. The environments in special collections divisions within many of our state's libraries which serve as repositories for a significant number of archival and special collections are controlled by the main facility's system, limiting their flexibility to implement appropriate temperature and humidity controls in their space. Further, as on-site and off-site storage options for collections at many sites are limited, staffs are forced to store collections in less than ideal environments — attics,
basements, closets...spaces traditionally deemed unacceptable. There are only a limited number of new buildings or storage spaces currently being designed or built to meet the ideal environmental specifications for the storage of collections.

This project identified a significant need for improved disaster preparedness and management planning at a large number of our state’s cultural institutions. Many sites lack even a basic disaster management plan. It is imperative that cultural institutions throughout the state plan for emergency response, coordinate local resources, establish relationships with local emergency officials, and create local response teams to assist one another in emergency situations. There is a need for resources to facilitate the development of site-specific disaster management plans, as well as a need for the creation of and support for volunteer-based emergency support teams.

Numerous organizations throughout the state currently present disaster management planning workshops. These workshops are well attended and are beneficial to both large and small institutions. The greatest challenge appears to be that once the attendee returns to his/her site, it is difficult to find the time to put pen to paper to write their site specific plan. It has been suggested that access to on-site technical assistance would facilitate the completion of their site-specific plans.

As noted previously, most institutions have limited staffing resources and this becomes most apparent when faced with an emergency or disaster. Thus there exists a need for local/regional communication networks and response teams, which are designed to respond to emergencies that cannot be handled by the museum’s staff and board members alone.

There is also a need for a centrally organized team of professionals who can immediately respond to a disaster involving any of South Carolina’s cultural institutions. The approach to disaster management planning could be local in focus and statewide in resources. To address local/regional needs, this team of volunteers should be willing to mobilize within hours of a call to provide triage and salvage assistance anywhere in the state. This team will be effective when an entire region has been struck by disaster, such as a hurricane or earthquake, and it is important to receive assistance from outside of the area as well as within the locality. The team could: (1) assist with immediate response and triage of damaged items; (2) remove objects from damaged areas; (3) determine levels of damage for salvage efforts; (4) assist conservators and museum staff with preliminary salvage and recovery efforts; and, (5) assist with basic treatments of damaged objects (if requested by staff and conservators).

In addition to increased funding opportunities, improved environmental management and disaster planning, the following resources were identified as essential to strengthen the long-term preservation and conservation of collections housed in many of the repositories visited during this project:

A “Circuit Rider” program is needed to provide for the improved safety and care of collections, offering hands-on, personalized assistance to small repositories across the state. A collections manager and a professional archivist serve as “circuit riders”, and visit museums, archives and libraries throughout South Carolina. These professionals would tour the site’s collections and exhibit areas, and speak with the staff or volunteers. Following this visit, the circuit riders provide a mini-assessment of the collection, and offer recommendations for conservation or collections care that stood out to them. They could also provide a personalized set of resources to help the staff follow up on the determined needs. This assessment would help sites evaluate their needs and if desired, prepare for a MAP or CAP assessment.

Technical Assistance Program. A mechanism is needed to assist museum, archives and library professionals and staffs who are facing a challenge they are not prepared to handle alone. A “technical assistance program” that offers ongoing support would allow individual access to the expertise in the South Carolina museum and archival
community. This program could be designed to help with specific projects, e.g., creating a furnishing or collections management plan, writing an interpretive plan, developing a disaster management plan.

**Bulk Purchasing of Archival Storage Supplies.** There is a need for access to affordable materials and supplies for collections storage. The purchase of basic collections management supplies such as acid free boxes, tissue, and mylar, as well as storage equipment is cost prohibitive for many sites. These materials are essential for not only basic collections care, but the long term storage and preservation of our repositories’ collections. It has been suggested that a mechanism be developed that will allow for state-wide group purchasing of archival materials to facilitate reduced pricing and cost savings.

**3. PROFESSIONAL SUPPORT**

This survey showed a need for enhanced staffing and improved professional support, training, and the strengthening of partnerships between identified cultural heritage agencies.

**Inadequate Staffing Levels.** With few exceptions, repositories surveyed cited a need for additional staffing to manage the care of their collections. In small institutions, basic collections management activities are often handled by administrators or not addressed at all. In medium and large-sized institutions, collections are often managed only by a single staff person, skeleton staffs or contract employees. There is significant reliance on volunteers in institutions of all sizes. However, it was also noted that reliable and committed long-term volunteer staff is becoming more and more challenging to find. Without adequate staffing levels, collections management activities go unaddressed, and a long term conservation planning and care is unattainable.

**Access to Staff Training.** There is a need for improved access to affordable and convenient continuing education, training and professional development in the area of collections management. Many institutions cited a reliance on the curatorial staffs at both the South Carolina State Museum and the South Carolina Records and Archives for consultation regarding both basic and emergency collections care. As noted previously, many sites rely on volunteers or paid staff, which possess limited or no professional curatorial training. Thus, there is a need for ongoing education and training in the fundamentals of best practices in collections care. It was also brought to our attention by collections managers who possess extensive collections management experience that there exists a need for training and education in current practices.

This project also identified a need for assistance in promoting awareness and understanding of available technology that will enable collections managers to build upon traditional collections preservation and conservation techniques. There exists a need for education and training regarding how our state’s repositories can benefit from new technology, how the care and long-term preservation of collections be strengthened with technology, and how technology be used to improve access to collections.

It was requested that future training opportunities be offered in all areas of the state, not solely in Columbia. While Columbia is centrally located, the time and travel, as limited as it may be perceived, remains burdensome, cost prohibitive and inaccessible to many. Furthermore, for those repositories managed by a single individual, even a single a day away often requires a site to close to the public.

**Online Resource Network.** Nearly all cultural institutions surveyed cited the importance of collaboration. Many strong and effective local and regional networks are established throughout the state, but there exists a desire to build stronger partnerships between cultural heritage agencies statewide. To meet this need, many recommended the creation of an interdisciplinary internet-based tool would allow for improved communication and collaboration among institutions throughout the state.

A single online resource would allow for all identified cultural heritage agencies to be referenced in a single location – currently, no such site exists. This tool would serve the professional community by facilitating
awareness of collections throughout the state and communication for professional development. This tool could incorporate: (1) a listing, description and link to all identified collections in the state; (2) a list-serve mechanism for information and resource sharing; (3) professional development and reference material on best practices that could be streamed/downloaded; and, (4) conservation and collections management resources (e.g., consultants, conservators, local vendors).

This online resource could serve the general public by facilitating access to and information about all of our state’s cultural heritage repositories and collections. This would enhance existing research, development and cultural heritage tourism marketing efforts.

**Marketing Support.** The approach to marketing our state’s diverse and unique collections is challenging because museums and archival repositories have a mission to educate the public, but must also sustain themselves (and in turn, their collections), by building audiences and revenues. Numerous institutions cited a need for assistance with the process of strategic marketing planning, program development and implementation. A great majority of museums in our state surveyed as part of this project are small and medium-sized, located in remote communities. They are in need of assistance in publicizing their offerings, while increasing visitation, expanding access to their collections and diversifying their audiences.

**Collaboration with Educators.** The cultural literacy of South Carolina’s children is a principal focus of our state’s cultural heritage repositories. There is a need and a desire to improve access to, as well as strengthen the understanding and use of primary source materials by students. Many expressed a desire to strengthen efforts to collaborate with educators to improve awareness of how they can offer museum exhibitions and archival materials to enhance and supplement classroom activities.

**CHALLENGES AND CONSIDERATIONS FOR FUTURE PROJECTS**
The project team was presented with a number of challenges:

- As noted earlier, a single resource that contains a comprehensive interdisciplinary listing of all heritage cultural agencies does not exist. Thus the first challenge was identifying all of the collecting repositories in South Carolina. A significant amount of time was invested in developing this list.

- Many sites selected are administered by part-time employees or volunteers and maintain limited or variable hours of operation (some are only open one afternoon each month, others close during posted hours if adequate staffing isn’t available on a given day to keep the doors open). Some do not maintain an internet presence, have access to computers, or even have telephones. Thus, it was necessary to make site visits to initiate contact which at times, still did not offer access to the site. At the conclusion of this project, there remain a number of sites that could not be reached at all. These factors also undermined the project archivist’s efforts to schedule site visits.

- The project was well received by most sites. Some site administrators expressed skepticism regarding the value of the project. Others that participated in previous Heritage Health Index Survey projects argued that their data was already had already been collected – once the distinction was made between this and previous projects all but one chose to complete a survey. A number of sites were hesitant to participate due to the perceived time commitment required to complete the survey document. The site visits proved invaluable in attaining completed surveys – without the site visits, there would have been a significantly lower rate of return.

- Technical challenges resulted in a delay in our getting started with the actual survey and site visits. The building of an online survey this complex was more laborious than anticipated, and therefore, took more time. The site visits themselves were dependent upon the survey being live, so a delay was necessary.
Survey site visits did not actually begin until January, and therefore, we were unable to wrap up the visits until June. The previous deadline was April. As a result, the number of survey site visits had to be reduced slightly. In addition, Clemson University continued to pay the salary of the Project Archivist even after the grant funding was exhausted. The technical challenges also resulted in a delay in spending all of the committed matching funds, but accounting through June will show that these (and more) matching funds were met.

In future projects, the following factors should be considered:

- Many respondents noted that the online survey was easy to use. The online survey instrument did not, however, provide a mechanism for respondents to print out a copy of their completed survey upon submission. While the data that had been submitted could be provided, it was in a format that was not easily readable and/or printable. In future projects, it would be beneficial to incorporate a print option.

- The survey was disseminated at a time of year which is traditionally quite busy for many institutions. Most of the site visits were conducted during summer months – competing with vacation schedules, sabbaticals, staff transition periods, restoration/renovation closures and August/seasonal closures. Thus, a number of sites were unavailable to meet the project archivists' request for an appointment. Further, many sites are run by volunteers and/or volunteer-based organizations, thus identifying a point of contact to discuss the project was challenging. Some sites had such limited staffing availability; they were unable to complete the survey.

- Allowing for a full calendar year to complete the survey process, including site visits would allow for increased flexibility to meet with sites that required additional time to coordinate with, thus resulting in a higher rate of return.

- Some site administrators expressed a lack of confidence in the data that they could provide, even with the offer of onsite assistance of the project archivist. A number of sites cited a lack of staff time that could be devoted to this project – it could not be a priority. These factors contributed to a number of sites requesting not to participate, or to submit an incomplete survey.
ADDENDUM – EXAMPLES (additional examples are available)

Grant funding can strengthen collections management programs. For example, the Director of the Georgetown Library is committed to developing unique and innovative programs for the library and its special collections. He makes it a priority to pursue grant funds to support these programs. As a result, he was able to hire a full-time staff member to administer a program to digitize the library’s special collections. This program was recently expanded to assist with the digitization of the collections of area museums as well as family scrapbooks and photographs belonging to residents who live in Georgetown. It is a broad reaching project that is documenting the history of the entire community. Further, this library has, through grant funding, completed a video based oral history project. Not only is this important documentation for the community, but a dedicated café-style space has been constructed in the library, that contains approximately 10 wall mounted televisions, that will allow patrons to sit back, relax, and watch and listen to (with cordless headsets) these oral histories. Their online digital library is a resource for not only the community, but serves as a resource for researchers throughout the United States. Note: When the initial grant funding for the position that coordinated the digitization program ran out, the Library’s Director was able to prove the value of the work this employee was doing for the patrons and the community and as a result, her position is now funded by the county’s budget.

New Construction of Dedicated Space for Collections. The Beaufort Public Library is now in the process of moving its special collections into a newly designed space, located in the library’s same site that contains expandable shelving, environmental controls, research space and processing area. However, this space is the culmination of more than seven years of advocacy on behalf of the staff, the Board of Directors, and library patrons.

The Florence Museum has partnered with the County to begin construction of a state-of-the-art museum facility.

Creative storage solutions. Marion Museum and Visitors Center is bursting, without access to off-site storage options in the short term. To improve opportunities to exhibit collections and develop much needed storage, it has begun building exhibition cases with hidden storage compartments in the rear.

Williamsburg County Museum purchased storefront next door to their facility (a former Carnegie library).

Museum Restoration/Collections Catalyst for Community Revitalization. The restoration of the Bean Market Museum serves as a catalyst for the economic revitalization of Lake City’s main street community. Utilizing public and private grants, town funds, and private donations, the restoration of the Bean Market Museum is nearing completion. This restoration project is the culmination of approximately ten years of strategic planning on the part of the community. The goal of this project is to not only restore the museum, but to create a community center adjacent to their primary business district. As part of the restoration, the administrators looked to utilize adjacent structures and land to develop state of the art exhibition, conference, special event, and collections storage spaces, while maintaining the integrity of the historic site in a town square/park setting. Another interesting concept incorporated into their plan is to incorporate the museum shop not in the museum’s historic structure, but in a main street storefront. The shop builds on museum and community-specific historical materials, but offers an inventory that includes gift and decor merchandise, meeting a community need while enhancing revenues for the shop. This project serves as an example of how a significant collaboration by all community partners will ensure the long-term preservation of the town’s most significant historic structure, promote the long term preservation and conservation of the museum’s collections, expand access to and diversify the audience for their collections, and stimulate the local economy.
Creative adaptive reuse. Three museums included in this survey are housed in former county jails. Jail cells still exist. The Chester County Museum houses its archives in a cell; also houses and exhibits its firearm collection in a cell – not only a creative use of existing space, but allows for additional security for collections.