

Budgeting for Collections Care

Introduction

The care of collections is essential to ensuring that our collective cultural heritage is preserved for generations to come. It can be daunting to consider the cost of collections care, especially for non-profit organizations working with tight budgets, but keep in mind that an investment in collections care is an investment in the future. Successfully budgeting for preservation activities helps organizations achieve preservation goals and shows a commitment to sustained collections care to internal stakeholders and potential donors and granting organizations.



Preservation Planning

It may seem basic, but good budgets are preceded by good strategic planning. The development of a strategic plan that includes the preservation of collections will help stewards to advocate both internally and externally for collections care focused funding. Especially beneficial is the inclusion of preservation in the institutional mission.

A preservation plan that outlines short-term, medium-term, and long-term goals for the collection is also an invaluable resource that will help stewards to look towards the future as they create yearly budgets. Another benefit of a documented preservation plan is that it can act as a reference in the event of a year-end surplus or unexpected donation. For example, if a preservation goal is to re-house a specific collection of photographs and an unexpected surplus comes up at the end of a fiscal year, collections stewards can advocate that the excess funding be allocated to the re-housing project and point to the strategic plan for documentation of need.

Documenting Existing Work

The next step in the budgeting process is gaining an understanding of the funds that are *already* being allocated to preservation. In a 2014 survey by Heritage Preservation and the Institute for Museum and Library Services, 49% of institutions reported that they budget for conservation/preservation activities, but it's likely that 100% of collecting institutions are financially supporting preservation in some way, whether it's documented or not. Activities like maintaining collections records,

enforcing safe handling practices, and HVAC and building maintenance are all forms of preservation. By recognizing them as such, collecting institutions can gain a better understanding of the actual cost of collections care.

It's also common, especially in small museums, libraries, and archives, for staff to wear multiples hats. For example, an archivist may be responsible for re-housing documents when they come into the collection, even if their job description doesn't specifically include preservation activities. Update job descriptions so that they accurately reflect the preservation activities of staff and volunteers. This will help stewards to understand the actual labor cost of preservation and to advocate for future preservation focused positions.

LYRASIS, an organization that supports libraries, museums, and archives, has developed a [tool](#) that is an excellent starting point for identifying those areas where organizations are already supporting preservation work. The worksheet covers everything from personnel to contracted services, to capital expenditures.

Cost Analysis

Once an organization has good strategic and preservation plans in place and an accurate picture of what funding they are already allocating to preservation, it's time to calculate how much additional funding is required to meet preservation goals. Cost analysis is a budgeting tool for identifying and calculating costs on a project basis. Cost analysis breaks down project costs into four categories: supplies and equipment, services, labor, and indirect costs.

Start with a manageable project from the preservation plan and do a cost analysis to find out how much additional funding is required to make it happen. Tools like [The Preservation Manager's Guide to Cost Analysis](#) and the Oregon Heritage Commission's [Collections Budget Report](#) are excellent resources with detailed information on accurately calculating costs.

Advocacy

Once you've developed a cost analysis for a preservation project, you're ready to advocate for funding both internally and externally. Keep those in your own institution and the public involved by sharing preservation projects on websites, social media, and in public programs. Track preservation statistics, like objects re-housed and monitoring done, so that you can share them with board members and other stakeholders.

Looking to donors and grants to fund specific projects is a great idea, but before looking outside for funding, make sure preservation is a line item in your institutional budget as well. Use your work identifying existing preservation spending and performing cost analyses to show stakeholders how much preservation means to the collection. Point to preservation plans and the institutional mission statement to bolster your argument. Finally, let stakeholders know that donors and granting organizations often look for internal support for preservation when deciding which projects to fund.

Quick Tips

- Include preservation in your institutional mission

- Keep preservation plans up to date and at hand in the event of an unexpected donation or budget surplus
- Document all existing preservation spending
- Update job descriptions
- Include preservation as a line item in your institutional budget
- Advocate both internally and externally
- Reference all of this work in grant applications

Web Resources and Further Reading

Preservation Planning

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<https://connectingtocollections.org/advocating-for-collections-during-challenging-times/>.