Conscientious Conservation: Global Collaboration, Leadership Development, and 21st Century Fundraising

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Conscientious Conservation:
Global Collaboration, Leadership Development, and 21st Century Fundraising for Preservation & Conservation
Universe Series

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# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aspects of Conscientious Conservation</td>
<td>4</td>
</tr>
<tr>
<td>Global Collaboration</td>
<td>7</td>
</tr>
<tr>
<td>Leadership Development</td>
<td>11</td>
</tr>
<tr>
<td>New Philanthropic Environments</td>
<td>14</td>
</tr>
<tr>
<td>Fundraising in New Philanthropic Environments</td>
<td>17</td>
</tr>
<tr>
<td>Resources</td>
<td>20</td>
</tr>
<tr>
<td>Notes</td>
<td>23</td>
</tr>
</tbody>
</table>
Our understanding of sustainability has changed radically over the last few years. The term has expanded along with growing awareness of the relationships between human activity, the economy, the natural environment, and our responsibility for the continuation of other species and human societies. Sustainability is not just innovation, “better living,” and economic viability but timely, collective restrain to support a vibrant and healthy earth while attending to the fulfillment of present and future generations.

As currently defined by AIC members, sustainability is a commitment to policies and practices that ensure social, economic, and environmental endurance, that when applied together with principles of collection care and preventive conservation, enable the preservation of both our world and our cultural heritage.
In the 1970s—not so long ago—researchers provided evidence connecting organic fluorine compounds and the depletion of the ozone layer. About a decade later, fluorinated gases and hydrocarbons were linked conclusively to the acceleration of global warming. These touted, man-made compounds had once revolutionized manufacturing, transportation, agriculture, and medicine. The very refrigerants, fire retardants, solvents, foaming agents, and propellants that assisted the care of our heritage collections were at the same time damaging the world’s physical environment and contributing negatively to climate change.

Paralleling 20th century breakthroughs in science and technology, conservators, conservation scientists, and specialists made major advances in every aspect of the field. Sobered by their experience during World War II and repatriation efforts after, experts from Belgium, United Kingdom and the United States set up, in 1950, the International Institute for Conservation of Museum Objects, now IIC. The organization grew, eventually attracting members from all corners of Europe and as far as Japan. One of the primary aims of the IIC was to conduct and publish original research for the purpose of disseminating and sharing findings among colleagues.

With the founding of the apprentice program at the Fogg Museum; academic programs at New York University and Cooperstown; independent labs like Barrows and Image Permanence Institute; and the conservation centers at the Library of Congress, Harry Ransom Center, and Johns Hopkins among others, the infrastructure for research and practice of contemporary conservation was put in place. Generations of conservation professionals affiliated with these institutions in the United States and similar ones abroad have since tackled a range of topics barely envisioned in the 1950s. These topics include the analysis of material composition, object behavior, and degradation processes; the mitigation of effects on mixed collections of light, pollution, pests, handling, and use; the use of optical and spectral instruments; standards and guidelines for documentation; teaching and training; ethics; electronic communication and publication; and public outreach.

Skeptical of high technology, power-dependent systems, cultural stewards in developing countries studied traditional practices and experimented with place-appropriate products, storage design, and passive systems to control pests and to mitigate object damage and harsh environmental conditions. Their findings have proven invaluable to energy-dependent countries with faltering economies and unaffordable, high-tech systems. In many ways, they adhered to sustainable practices rooted in tradition and rational appraisal of the finite and irreplaceable nature of resources.

Working together across continents, conservation professionals have shared ideas, designs and techniques for energy conservation, resource use and waste reduction as well as risk analysis, disaster planning and response. Despite their relative small numbers, cultural stewards everywhere have contributed to making the practice of conservation and preservation sustainable. Although sustainable practices and guidelines seemed relatively new about ten years ago, the guidelines are understood, if not already in effect, throughout much of the world. The spirit of sustainability meshes well with ethical practices such as minimal intervention and reversibility, thus reinforcing it.

During the first decade of the 21st century, almost all aspects of sustainable preservation and conservation were presented and discussed at conferences such as The Preservation of Archives in Tropical Climates (Jakarta 2001); Foro Social de Información (Buenos Aires 2004); From Gray Areas to Green Areas (Austin 2008); and Climate Change and Museum Collections (London 2008).

Important resources such as the tutorials prepared by Cornell University Libraries and Northeast Document Conservation Center about the preservation of archives and libraries were posted online, where they are still frequently accessed. The Consejo Nacional (México) para la Cultura y las Artes published

These have all rightly emphasized energy conservation, emergency planning and response, alternative materials and practices as well as the specific benefits and risks of display, storage, shipping, and complete building systems. At this May 2014 conference of the American Institute for Conservation of Historic and Artistic Works, presenters will discuss how to take into account environmental, economic, and ethical considerations when carrying out conservation treatments.

Even though we cannot lose sight of the best sustainable practices the field has generated in recent years, sustainability is fast moving beyond the urgency of reducing our carbon footprint and avoiding the waste of resources. A number of issues related to new risks faced have been touched upon by the such symposia held by the Getty Conservation Institute as *Climate Change and Preserving Cultural Heritage in the 21st Century*. This symposium addressed climate change and the anticipated disruptions to economies, populations, and entire cultures in vulnerable areas. Like never before, conservators must be alert to connections between their projects and issues related to inequality and the need for sustainable economic development; involuntary dislocation of populations; reparations; repatriation; reconciliation; literacy; and socio-cultural needs of people. This is particularly important for conservation professionals leading global collection care projects. Projects must seek some resonance between these complex international issues and how they intersect with the values of the humanities, material sciences and natural sciences, inherent in the practice of conservation.

Another effort that conservation professionals have to assist is persuading policy makers and elected officials away from thinking about culture and the arts as frivolous activities of the elite. Instead, policy makers must be led toward understanding cultural heritage as an essential ingredient for survival, identity, and community continuity.

To tackle the multiple dimensions of contemporary practice, conservators cannot operate in isolation but instead must collaborate with trusted partners in order to harness maximum compassion, vitality, and creativity. Technical proficiency, contextual knowledge of objects, materials and processes as well as analytical and research skills are vital professional competencies. To be adept at collaborating internationally, it is also necessary to maintain regular communications with colleagues; engage with allied professionals, decision makers, and the public; and hone advocacy, and fund-raising skills.

Individuals can reasonably expect to grow personally and professionally into these new modalities by taking incremental steps in these various areas:

- Developing country-specific contacts
- Seeking mentors
- Traveling, visiting, and engaging with communities and institutional leaders
- Promoting respect for the field and other professionals
- Strengthening language skills and cross-cultural training
- Applying for individual and institutional funding
- Using emerging technologies and social media to increase visibility for projects
- Building public awareness about projects
- Stimulating shared decision making
- Establishing short and long term sustainable preservation and conservation plans
- Devising and implementing cost-effective preventive care solutions
- Ensuring accountability
- Integrating funding proposals and investing funds with sustainability in mind
- Training future trainers

The following sections of this pamphlet will suggest next steps and sketch the changing contexts into which the field of conservation can conscientiously and confidently enter. This pamphlet is designed so that the text can be modified and additional ideas and resources can be added. Please send your suggestions and comments to culturalheritage@outlook.com
The interactive Google map, shown above and linked here, shows the activities of international teams working collaboratively, across borders, to preserve the world’s photographic heritage. Since 1999, about 100 organizations, funded by 22 grant-makers, have collaborated to support workshops, training sessions, research, conservation treatments, collection assessment, and digitization services in 46 cities in 35 countries. Groups have formed from Lima, Peru to Wellington, New Zealand and from Riga, Latvia to Cape Town, South Africa. Hundreds of individuals have participated, everywhere developing professional relationships, building capacity, and exchanging valuable knowledge about the preservation of visual heritage.

As daunting as it seems, it is possible to become involved in similar specialty groups, emergency response teams, or to begin a group of your own. The map serves as a resource to bring people like you together with relevant organizations and to strengthen conservation efforts throughout all regions of the world.
When looking over the data represented on the map, you will notice that key organizations involved in the international collaboration in photo preservation include the Centre de Recherche sur la Conservation des Collections (CCR); the Foundation of the American Institute for Conservation of Historic and Artistic Works; the George Eastman House; the Getty Conservation Institute (GCI); and the International Center for the Study of the Preservation and Restoration of Cultural Property (ICCROM) among many others. Most of these organizations have presence online and maintain their webpages up to date.

These international organizations form a ready-made infrastructure for collaboration and communicating ongoing research, methodologies, partnerships and conferences. These types of organizational links help bring together people and mobilize the resources of communities of interest throughout the world. They make possible cross-sector collaborations that include governmental officials, corporations, and a variety of nonprofits organizations. A good example of this cross-sector collaboration is the international disaster preparedness training program to be held again in 2014 at the Institute of Disaster Mitigation for Urban Cultural Heritage of the Ritsumeikan University in Kyoto. The training program is sponsored by Toyota and coordinated by ICCROM, ICOMOS, and UNESCO.

The Middle East Photograph Preservation Initiative (MEPPI) represents another example of a broad umbrella of collaborators focused on a singular goal. The Arab Image Foundation, the Art Conservation Department at the University of Delaware, the Metropolitan Museum of Art and the Getty Conservation Institute partnered to promote the preservation and awareness of photograph collections in the Middle East from North Africa through western Asia. Since 2009, sixty-six individuals have participated in the workshops held in three countries—Jordan, Morocco and the United Arab Emirates.

L’Ecole du Patrimoine Africain and Resolution, a non-profit group dedicated to the preservation of African photographic heritage, have partnered with three other institutions to pilot an exciting four-day workshop in Porto-Novo, Benin. Twenty museum and archive professionals, curators, and a younger generation of photographers and artists, who look after significant photography collections in multiple countries and regions of Africa, have enrolled. The workshop, held in April 2014, was the first in a series that will bring together the custodians of major photographic collections across Africa.

The credibility and resources represented by these types of collaborations go a long way towards achieving measurable success and lasting impact. Because the members of these organizations commit to developing clear and doable agendas for their programs, they necessarily spend quite a bit of time in discussion, working out strategies, desired outcomes, and benchmarks of success. Partners engage in these essential activities to discover their unique strengths and potential weaknesses and to forge permanent links among members. Through the links, pass the communications, eventually forming the bonds that build the infrastructure and attract needed funding.

On the other hand, powerful collaborations do not have to be formal or large in scope. Many ad hoc groups and individuals have made significant contributions to conservation and preservation of cultural heritage. The accomplishments of the chemists, bookbinders, restorers, art historians and sundry others who rushed to the rescue of Florence’s art works after the 1966 flood are well known and recorded. Similarly, following the devastation of along the U.S. Gulf Coast during and after Hurricane Katrina in late August 2005, members of the American Institute for Conservation coalesced individually and in groups with several national agencies and institutions to assist the recovery and stabilization of hundreds of damaged heritage structures and collections. With that post-disaster experience, volunteers set up permanent collections emergency response alliances and teams still in effect now.

Not all collaborative projects emerge from disaster conditions but instead provide needed assistance or seek sustainable, preventive solutions to cultural heritage dilemmas. For instance, every year, as part of
the AIC annual meeting, volunteer members work with local conservators to develop assistance, or Angels, projects. The primary goal of the Angels projects is “to promote a broader understanding of the importance of cultural preservation while providing meaningful assistance to important local collections.” In 2009, the Angels project worked with staff of the Sherman Indian Museum in Riverside, California, to inventory, survey and re-house objects and archival materials from the museum’s collection. The visit also served to support the curator’s ideas about improving storage and access. It is easy to join them!

Another example of cross-cultural collaboration is embodied in the person and work of conservator, paper historian and teacher, Jim Canary. Canary has been studying and teaching Tibetan papermaking techniques for decades, preserving the knowledge while experimenting with new methods of recycling Western waste paper. Canary is currently collaborating with Rob Waller, Ann Shaftel and other conservators in assisting the Monk and Nun Treasure Caretakers with advanced training in preservation, inventorying and documentation techniques.

During the summer of 2011, paper and photograph conservator Heida Shoemaker traveled to Mali and made plans to work at the new manuscript conservation center in Timbuktu. Because the rebel insurgency in Northern Mali cancelled her plans, Shoemaker refocused instead on collaborating with the photography school in Bamako, capital of Mali. At the school, Cadre de Promotion pour la Formation en Photographie, she offered a 2-day photo preservation workshop and later began re-housing the negatives of renowned Malian photographer, Malick Sidibé. Shoemaker covered costs of her 2013 projects in part with funding obtained from the social media website Indie-gogo; a research grant from FAIC; and professional development grants from FAIC and the University of Delaware Art Conservation program.

Although they may be much more demanding, solo projects may not attain the same level of impact that a larger organization may achieve. Working with an existing institution frees up individuals from some of the delays and difficulties of establishing connections and obtaining approvals; making complex international arrangements; or even clarifying goals, needs and setting up new habits of communication. Established organizations may be able to secure resources including funding and to provide leadership setting up priorities and outcomes, assessing competencies, clarifying roles, and setting up working teams. When setting up workshops or accommodating more than a few individuals, the larger organizations can use their own equipment and mobilize personnel.

Larger organizations also can plan and sustain multi-year programs and draw on many more volunteers and experts. On the other hand, the larger organizations may not have the flexibility or the inclination to take on experimental projects that may prove much more satisfying and meaningful to the people involved. The standards of performance and accountability under which larger organizations function often require measureable production outcomes and preclude results such as goodwill, understanding, and enjoyment. These of course are essential for creative inspiration and a sense of collective purpose.

Collaboration happens when two or more individuals work together towards common goals and objectives, reached by sharing knowledge, learning, and building consensus. This requires persistence, honesty, introspection, and clear communication. Because it has broader implications beyond the immediate project, collaborative work can contribute positively to the world as well as offer the means to express our creativity and most deeply held values.

But working in groups is not always easy. Groups generate their own dynamics, especially if the works sessions last more than a few days. Subtle differences in rank, class, institutional affiliation as well as gender, ethnic, and religious differences may come into play so that it reduces meaningful participation. Language might sometimes present barriers and require skilled translators. Anticipate some of these difficulties; when you can, plan group formation and work sessions accordingly—invite participation by all, drawing on their curiosity and collective wisdom. Whenever
possible, focus on real needs and useful skill-building. Identify problems for the group to solve together. As a group, think through plausible causes and solutions to these problems, and how they are interrelated.

Possibly the most critical task you will have to perform is honest and continuous self-evaluation. From the beginning, take stock of your competencies, credibility, trustworthiness, persistence, patience, composure, tolerance, flexibility, and capability to adapt to changing circumstances. In the field, all of these personal characteristics will be tested, if not stressed. Everything from the weather to governments can change from day to day.

Clarify your goals, whether personal, educational or professional. Be clear on what you are hoping to achieve in concrete terms. What do you desire as the results for the project? Think about what else may be a greater goal beyond the need to satisfy your own curiosity, education, or career. Think through the commitments that you will make and whether you are positioned to follow through to fulfill them. If project partners cannot fulfill their part, what effects will that loss have on you and the project?

As they develop, write down your thoughts, discuss them with supportive individuals, or post them on professional discussion platforms like CoOL DistList, conservation and preservation blogs, a LinkedIn group such as Collections Preservation and Care, or other social media you access frequently. Contact individuals who have undertaken similar projects and seek their input or participation. Browse the relevant literature.

If going abroad for a project, familiarize yourself with the culture, geography and climate of your destination country. If possible, travel there to cement your connections before attempting to do any work. Continue developing and improving your language skills and cultural competencies. Get to know living circumstances and family of your project partners and be sensitive to their needs.

Once the project gets under way, goals and priorities may have to be adjusted or renegotiated depending on local factors and resource availability. Reiterate the shared goals and purpose of the collaboration at intervals. When things go wrong, retrace steps without blaming anyone. Reward signs of shared authority and note individual successes.

Whenever possible, build teams that can stay together to carry on the work. Integrate as many necessary skills and as much technical expertise and experience as possible. With newly formed groups that have not yet develop the habit of meeting regularly, establish regular meeting days and times that are agreeable to the largest number of contributors. Model a variety of brainstorming and evaluation strategies and stay alert to new ways to discuss ideas, manage conflict, and generate enthusiasm.

Prepare in advance for leave-taking, which is emotional. Collect names and addresses or other contact information so you can stay in touch with your teams and colleagues working in remote areas. Agree to carry out doable tasks to be continued by all group members. Discuss how the group will stay informed about ongoing activities and report on individual contributions. Exchange ideas about ways to stay in touch about future developments. Can social media serve as viable means of communication? Find opportunities to present the work to the public as the project grows and develops. Publicize the project.

Colleagues around the world will be interested in what you are doing and towards what goals various groups are working. They want to join and contribute to ongoing successful projects that match their interests and goals. Mentor young people and engage them as much as possible. Communicating with others about your projects and experiences inspires others. These exchanges advance the field and generate interest in preservation and conservation.

Prepare to leave the project in the hands of others and trust that they will exceed your wildest expectations. Reflect on accomplishments and difficulties. Honestly and with humor accept all of them as learning experiences. Before departing, hold a closing ceremony of some sort as that is probably one of the most satisfactory ways to take leave of the group.
The previous section indicated that effective long-term international collaborations require permanent or semi-permanent infrastructure hubs, which hold together the work of the local groups. A hub may consist of an individual or of single members from different groups, who bind participants together. The hub encourages and motivates continuity; validates shared agendas; establishes standards and benchmarks; and sustains active communications networks over time. Dedicated hubs are crucial for sustaining projects over time, especially when the sponsoring partners are far-flung and not in regular physical contact with local groups. Funding to keep the activities of the hub going helps quite a bit, but is not always available. The other essential ingredient for sustaining viable collaborations is the development of leadership skills by individuals within the various active groups. Skillful leadership can often overcome shortage of funds.
This section treats leadership and how leadership can be developed individually or developed by a group. Lastly, the section investigates why the building of leadership at the group level is valuable.

After years of research and discussion on the topic, experts understand leadership as a series of intentional, constructive activities rather than specific personal traits or location in power positions. No matter how capable or well positioned a person or group is, without right action there is no achievement.

Another key understanding about leadership is that success depends on relationships. Whether at home or internationally, to be effective at meaningful levels, action has to be coordinated across all the relevant sectors, disciplines, age, or class groups. At the very least, leaders have to foster new relationships and engage the ideas and talent of everyone concerned. Leaders build relationships and help the group members establish connections outside the group. Relationships add vitality to a group and lend credibility to the activities undertaken by them, if only because the activities become more visible and understandable to the larger community.

The complexity of international collaborative projects demands of leaders an increased capacity to imagine, dream, and achieve beyond expectations. Leaders must at the same time inspire others to act beyond familiar categories and stereotypes; encourage risk-taking and creative solutions beyond the limits of resources. Leaders must also foresee unintended circumstances brought about by the changes they put in motion.

Leaders fulfill these demands in various ways. For one, leaders do not wait to be authorized to act. Leaders examine the landscape and tease out the interrelationships between issues, needs, and resources, forming a vision of how things could be different, for the better. What are the heritage preservation challenges confronting the community or region? Are these challenges related to climate change, civil unrest, poverty? How can these interrelated issues be tackled and by whom?

A leader crafts a compelling vision by articulating and discussing it until it is clear and understood by others. Engaging others in crafting a vision and outlining the steps that will make the vision come alive involves people deeply and enlists their help. Thus, helpers become co-leaders when their interests, talents, and skills coincide with project needs. Leaders form communities of practice, who together can develop practical solutions that take into account local traditions, customs, a variety of skill levels, and a shortage of resources.

Selecting whom to engage in the process of developing the vision is critical. A project may be planned to improve the environmental conditions for a significant set of documents; to train the document caretakers in appropriate preservation techniques; to digitize entire collections; to develop guidelines for adding to collections; or even to generate heritage preservation policies and influence policy makers. Strategies need to address a greater need, be sensible, and communicated well in order to reach out to individuals who can and want to participate in clear-cut objectives at the level needed for each phase of the project.

Leaders listen, ask productive questions, and solicit ideas and proposals. Sometimes it is wise to listen and do nothing, but rather take in the details and meditate on the manner in which something was discussed. In matters of heritage preservation, there are many intangibles that are often difficult to fathom across cultures.

Leaders set good examples. Leaders do their share of difficult or unpleasant tasks. Whether furniture needs to be moved away from walls; insect traps set; floors mopped; or windows secured, working together to get the tasks done builds team spirit and demonstrates good practices. In whatever case, the action shows the importance of the details associated with tasks and the parallel importance of the individuals who perform them. Everyone counts.

Leaders foresee pitfalls and proactively prepare individuals to recognize internal problems. Leaders
make sure that all individuals have the information and tools necessary to proceed with their work with confidence. Share technical expertise and discuss decision making processes. Ideally, all team members understand what is to be done, how, and why.

Even in the best circumstances, difficulties will arise that hamper the work. The difficulties may include interpersonal frictions, unwillingness of one or more individuals to work, or resistance to group norms or decision making. Sometimes difficult situations arise because individuals do not feel confident or supported in what they are doing. Step back and study the situation. Lightly address any unusual circumstances before the issue grows. The group, or individual group members, may solve the situation on their own.

Sharing responsibility for the well-being of the group distributes authority and bolsters the confidence of new leaders, which is crucial where continuity of the whole is not assured. In many cases, individuals will have to continue pursuing the goals of the group alone or as a much smaller group. The development of collaborative leadership also enlarges and strengthens the support network. Connected organizations are better able to gain visibility, support, and larger-scale positive results when resources are scarce and many disparate organizations and teams clamor for the little there is to share. Connected organizations increase capacity by sharing know-how and contacts as well as reduce duplication of effort.

Individuals know people involved in other teams, organizations, and social networks working in different fields and sectors, but towards the same or complementary goals. Reaching out across all these boundaries is essential for increasing sustainability, innovation, and advocacy. At some point, the media, policy makers and government officials must be contacted; the more extensive the network the more likely those fruitful connections will be made.

Policy makers and elected officials like to be informed about projects in their jurisdictions. Send out letters; invite them to visit your project; share photos and project updates with them. To coordinate these growing activities in a meaningful way, individuals familiar with basic advocacy principles will be needed. These too can be learned. Several organizations such as American Alliance of Museums and the Conservation Center for Art and Historic Artifacts (scroll down to bottom of page) provide advocacy tool kits that can be tailored for international settings.

As projects evolve and the organization matures around the central infrastructure, leaders channel the activities of capable individuals in the group into more specialized functions. As technical expertise grows, individuals can be more involved in the administration and managing of the organization; in strategic planning and project evaluation; developing a board; seeking stable funding or other partnerships; and begin the process of training new staff and volunteers.

Maturing organizations with a credible track record and a viable mission can seek funding for organizational development and partnering. As the organization grows, the need to build more capacity and the pressure to evaluate and readapt will also grow. A robust network helps, if only to see how others cope and evolve.

Partnering with organizations with similar objectives is responsible action. Partners can address sustainability more concretely. As the Chicago Community Trust has clearly noted: “As government funding becomes increasingly constrained and foundation funding remains level, the most successful nonprofits will be those that are able to raise funds from new and diverse sources: targeting individual donors, tapping corporate marketing dollars, starting social enterprises and devising other innovative ways to generate new support. When additional fundraising is insufficient, organizations often need to consider merging or sharing back-office functions such as accounting, information technology, purchasing, insurance or human resources.”
Philanthropy is the voluntary transfer of personal wealth for the benefit of public causes and needs. In the United States, voluntary transfers of assets flow through public charities or private foundations, which make up the largest part of the nonprofit sector. Cultures all over the world maintain traditions of almsgiving, tithing, dana, tzedakah, and zakat through parallel institutions. The motivations for giving are extremely complex. Individuals generally give to causes they are passionate about and to institutions to which they are closely connected. Why they give is less well understood.
Motivations often include the desire to help others; to do good; to do the right thing; to earn respect; to set an example; to share excess wealth; to atone for guilt; and even to earn tax benefits.

Contributors to charitable organizations in the United States enjoy tax deductions for similar reasons that charitable organizations are tax-exempt. Tax exemptions by governments, whether federal or local, provide nonprofits additional support for the good that they do. Public charities, such as religious organizations, hospitals and educational institutions as well as community foundations provide programs and services that neither the market nor the government provides.

The market does not provide such services because no profit can be made by doing so. The government finds it more expedient and efficient to exempt the charitable institutions from paying taxes than to attempt to provide the programs and services the institutions provide. The government also exempts private foundations from most taxes. Private foundations do not provide charitable services directly to beneficiaries; rather, they make grants to other organizations. To retain their tax-exempt 501(c)(3) nonprofit status, foundations must distribute an established percentage of assets every year and follow governance and reporting rules set by the Internal Revenue Service, or IRS.

According to the National Center for Charitable Statistics of the Urban Institute, the non-profit sector in the United States consists of more than 2 million organizations, of which 1.6 million are registered with the IRS. Of these, about a million have enough activity to report to the IRS annually. These reports to the IRS are known as Form 990 or the 990PF. These forms, along with individual and corporate tax returns, become the basis for assessing the scope, nature, and effects of activities in the non-profit sector.

Nonprofit organizations provide a variety of programs and services classified according to the National Taxonomy of Exempt Entities into ten broad categories, including: arts, culture, and humanities; education; environment and animals; human services; health; international and foreign affairs; public or societal benefit; religious; mutual/membership benefit; and unclassifiable. The National Center for Charitable Statistics, the IRS and many nonprofit organizations collaborated to devise the classification system for the purpose of standardizing data collected and making comparisons easier and more reliable.

In general, the non-profit sector generates $1.5 trillion in revenue through government grants and contracts; fees for goods and services; interest, dividends, and capital gains; rents; ticket sales; and contributions from individuals, foundations and corporations. From revenue, the sector contributes close to $800 billion directly to the economy every year, making up about 5.5% of the gross domestic product or GDP; salaries, wages, benefits paid and rents and investment income earned make up about $780 billion contributed to the economy.

Of the $780 billion, about ¼, or $585 billion, go to the salaries and benefits of employees in the sector. Nonprofits employ 13 to 14 million individuals, or approximately 10% of the country's workforce. According to statistics collated by the Urban Institute, health care and education employ the most employees in the non-profit sector; health care and education employ 54% and 18% respectively while the arts, entertainment and recreation employ 4%. Similar proportions hold for the charitable portion of nonprofit organizations. Individual salaries and benefits combined average less than $45,000 per year—not princely sums—yet the non-profit sector has been one of the fastest growing employers in recent years.

From endowments, real estate and other property, equipment and unspent funds, nonprofits have accumulated over the years about $4.5 trillion in assets. Hospitals and institutions of higher education hold a disproportionate percentage (about 50%) of these assets. For comparison, note that the U.S. Bureau of Economic Analysis calculated GDP to be about $15.5 trillion for 2011 and $15 trillion in 2010. The enormous assets held by nonprofits make them vulnerable to criticism and the distrust of politicians and policy makers.
The single fact found most disturbing by critics, however, is that the tax exemptions reduce federal tax revenues by $115 to $130 billion annually; property value tax exemptions reduce local and state taxes by another $20 billion, if not more. Another criticism often leveled at nonprofit organizations is lack of accountability; nonprofits lose to theft or misspend between 13 to 16% of their income. These vulnerabilities affect how nonprofit organizations are judged as worthy recipients and how charitable donations to them will be taxed in the future.

Total contributions to non-profits amount to about $300 billion every year. These contributions by individuals and foundations represent about 20% of the $1.5 trillion nonprofit revenue. In addition, one out of every four Americans provides about 8 billion volunteer hours, equivalent to 4 million full-time volunteer workers. Without this free service, many nonprofit organizations could not function. The Bureau of Labor Statistics noted that volunteer hours are spent collecting, preparing, distributing, or serving food; providing labor; fund-raising; tutoring or teaching; and coaching sports. In 2011, volunteer support, valued at approximately $22/hour, represented about $170 billion; this value is in addition to the contributions made by individuals.

According to estimates prepared by the Giving Institute of the School of Philanthropy at Indiana University, the source of the $300 billion in annual monetary contributions breakdown as follows:

- 73% from individual donations
- 14% from foundations
- 8% from bequests
- 5% from corporations

and the sums were directed to recipients as follows:

- Religion – 32%
- Education – 13%
- Human services – 12%
- Gifts to foundations – 9%
- Health – 8%
- International affairs – 8%
- Public-society benefit – 7%
- Arts, culture, and humanities – 4%
- Environment and animals – 3%
- Unallocated – 3%
- Grants to individuals – 1%

According to a 2009 Congressional Research Services Report about the nonprofit and charitable sector, the number of IRS registered organizations providing arts, culture and humanities programming and services total less than 100,000, or about 10% of all registered nonprofits. Yet, the revenue and assets these organizations enjoy amount to 2.3% and 3.9% of the total enjoyed by all others. Despite the public perception of great treasure held by art museums, the revenue streams and assets of arts, culture and humanities organizations are miniscule. Even if only amounting to 2.3% of all revenues generated by registered nonprofits, that revenue generated by arts, culture and humanities organization does total $22.7 billion annually. That amount comes from a varied mix of funds generated as follows:

- $9.62b from private contributions
- $6.61b from private payments
- $2.83b from government grants
- $2.09b from investment income
- $1.52b from other sources

Even though these organizations have diversified their revenue streams, the perception of the arts as the concern of the elites only has been difficult to shake. There is a kernel of truth to that perception as IRS statistics indicate that over 90% of individual contributions to the arts, culture and humanities by individuals comes from households with annual incomes above $200,000. 34.4% of the contributions comes from households with income over $1 million; 59.3% from households with annual incomes of $200,000 to $1 million.

Individual donations to the arts in other countries may follow similar patterns, so it is worthwhile to study whatever statistics are available and how these match up to perceptions. The need and concern for conservation and preservation of personal, community, and world cultural treasures may often outstrip the sums contributed or made available. The case must be made for continued, ample support. Advocacy must highlight the greater social benefits derived from the thoughtful stewardship of cultural heritage.
Individuals and organizations seeking funds and stable support for conservation projects must be alert to continual changes in philanthropic environments. External and internal factors affect the practices of foundations and funding agencies. The economy, world events, and research as well as fads influence the goals and objectives of funders. Successful grant seekers must pay attention to the aims of funders and cast their grant proposals according to themes set by them. The themes seem to vary according to socio-political winds.
Philanthropy as voluntary distributions of personal assets for “good causes” as determined by the wealthy came under the scrutiny of Congress during the 1960s, resulting in new laws and a sector wide re-evaluation of practices. The pressure to become more effective and accountable pressured foundations to hire organizational, legal, and accounting advisers. These actions led to an overall professionalization of the field that once had been guided by predilections, moral obligation, and tax advantages.

The professionalization of funders, during the 1970s and 1980s, forced recipient organizations to follow suit. The preparation for site visits, the crafting of program and project proposals, the collation of qualifying documents, and the end-of-project evaluations required by funders demanded different types of expertise from nonprofit organizations. The organizations first drew on board members to satisfy funder demands, but eventually hired professional program coordinators, analysts, grant-writers, and fundraisers to carry out non-service related tasks. Staff size increased. Hard won funds were stretched to cover the costs of growing development departments.

During the 1980s and 1990s, reduced government grants forced many charitable organizations to generate income from fees and to increase the number of programs and services provided. Legal, accounting, and auditing departments created to manage and administer contributions, legacy gifts, endowments, service contracts and revenue-generating programs increased administrative expenses and bureaucratic tendencies. Applications for project funds became more complicated. Requirements for measurable outcomes and return on investments migrated from the for-profit to the non-profit world.

The agendas, if not ambitions, of grant-makers are driving recent changes in philanthropy. New billionaires, minted in financial and technology industries, have discovered charitable organizations as the means for “making their mark.” Thus, private foundations and nonprofit organizations have become vehicles for influencing national and international policies, not necessarily for responding to the eclectic needs of grantees.

Philanthropic organizations spend considerable funds on research, consulting and marketing services provided by firms. Funder networks such as the Gates Foundation, Giving Pledge, and the Clinton Global Initiative aggregate great wealth and potentially could channel it to specific issues, such as poverty, food insecurity, and climate change, not directly related to art conservation and preservation.

Because they command such a disproportionate percentage of resources, the philanthropic wealth aggregators can afford to hire management consulting firms or to establish think tanks to determine what global needs are most pressing. Since many of these represent competing needs—say, economic development and environmental impacts or worker safety—considerable funds are spent to study and then to persuade the public about the perceived costs and benefits of each issue.

Economic circumstances also impact philanthropic environments. The Great Recession of 2008 wiped out assets and discouraged charitable giving. Institutional and individual funders cut back charitable distributions. Old funding structures and new financial instruments emerged to fill the void. Venerable community foundations arrived back in the news when many local corporations began making large contributions to the Silicon Valley Community Foundation and the San Francisco Foundation. For example, in 2013, the Zuckerbergs contributed $992 million worth of Facebook stock to the Silicon Valley Community Foundation. Donor advised funds managed by brokerage houses such as Fidelity Investments are also increasingly popular. By 2012, 180,000 donor advised funds held $45 billion in assets, after distributions of $8 billion.

Social impact bonds, which seek a return on charitable investments, are new tools already accepted by several states in the United States. Investors with excess funds like social impact bonds as the bonds promise a double benefit in financial returns and social good.
Affinity groups representing large philanthropies are cautiously watching the preliminary moves by the U.S. Senate Finance and House Ways and Means Committees. Philanthropic organizations will be impacted if charitable donations are struck or reduced by the pending tax reform. To date, the arguments in favor of eliminating, or at least adjusting, the tax benefits allocated for charitable contributions are gaining momentum.

The above listed represents only a few of the recent changes affecting the direction and administration of funding organizations and philanthropic foundations. The entire non-profit, tax-exempt sector faces transformative changes.

Twenty-nine different types of tax-exempt organizations exist in the United States, many of which are thought to be serving private or political interests. There is also concern that there is very little oversight over the 1.5 million tax-exempt organizations now in existence. Preliminary research indicates that as few as 1 in 3 of charitable dollars may be spent on the needy or on causes associated with public well-being. Many proposals for introducing new regulatory regimes or forming institutional watchdogs have already been put forth.

Online philanthropy continues to grow. Currently, individuals and organizations in need of supplementary income are experimenting with electronic fundraising tools to fund special projects and social media to increase their contributor base. These efforts require skillsets that grant seeking individuals and organizations do not always have. Developing and exploiting these skills will take time; yet, results proportional to effort expended are not guaranteed.

Gaining access to larger numbers of individual contributors—the largest charitable giving population—serves as a motivator for implementing crowdfunding campaigns as does the hope of wresting independence from grant-makers. Substantial funds have been raised through all the online fundraising tools like kickstarter. An April 2013 industry report, by massolution, forecast that five models of crowdfunding activity in 15 countries across 318 platforms would generate over $5 billion during 2013. This represents a tantalizing sum, but one that is not much more than a drop in the philanthropic bucket. In the United States alone, charitable donations amount to $300 billion annually; the annual U.S. giving total reaches $600 billion, if remittances and international investments are counted.

Many issues that funders want to address, like poverty, natural disasters, human rights, have global dimensions. Whatever the motivation of funders, the Foundation Center has noted over the last decade a net increase in international giving as well as in giving to domestic institutions that support international programs.

In the past 10 years, increases in the number and finances of nonprofits have varied across categories. The two smallest categories, international affairs and environmental issues, have seen the largest growth in number of public charities, increasing 73 and 83 percent, respectively. International and foreign affairs organizations also have grown financially, with revenues growing 91 percent and assets 75 percent.

Large-scale impact projects at global levels receive as much interest and support as do local and regional initiatives. This turbulent transition may be the time to conceive and pitch international, collaborative projects in conservation and preservation!

Given the complex philanthropic environment which you are entering, keep these questions in mind: What global societal challenges does your project address? How will your project’s success advance the goals of your funder or funders? Does your project foster collaboration and encourage participation? Will the project be sustainable over time without large expenditures? What project outcomes are measurable? Have you established a credible way for measuring short- and long-term effects of your project? If so, take bold steps and imagine success!
The resources included here not only provide the references, statistics, and a variety of perspectives on the topics covered in the handout, but they also represent the latest research and publications freely available online.

The scholarly literature published in the areas of conservation, preservation, leadership development, collaboration, fundraising, and philanthropy is extensive. Since much of this literature is expensive, or inaccessible, to individuals and organizations that do not have subscriptions to specialized databases, they are not listed here.

If you know of online resources that would be valuable to our colleagues here and abroad, please email the link or links to those resources to culturalheritage@outlook.com. This handout will be updated accordingly within the year.
SUSTAINABLE CONSERVATION AND PRESERVATION

From Gray Areas to Green Areas Symposium Proceedings
https://www.ischool.utexas.edu/kilgarlin/gaga/proceedings.html

Preserving our Heritage, Improving our Environment
http://ec.europa.eu/research/environment/pdf/20years_cultural_heritage_vol1_en.pdf

Survey and Outcomes of Cultural Heritage Research Projects

GLOBAL COLLABORATION

Collaboration and Fundraising for Preservation of Photographic Materials
https://www.academia.edu/2606239/
Collaboration_and_Fundraising_for_Preservation_of_Photographic_Materials

Connecting to the World’s Collections: Making the Case for the Conservation and Preservation of our Cultural Heritage
http://www.imls.gov/assets/1/AssetManager/SGS_Report.pdf

Global Heritage Network: How You Can Help

Open Society Foundation: Grants and Fellowships
http://www.opensocietyfoundations.org/grants

Take Action: Community Tool Box
http://ctb.ku.edu/en/get-started

LEADERSHIP DEVELOPMENT

American Institute for Conservation Emerging Conservation Professionals
http://www.conservation-us.org/publications-resources/careers-in-conservation/emerging#.UvgFqPISb5M

Center for Curatorial Leadership
http://www.curatorialleadership.org/team.html

Developing History Leaders @SHA (formerly the Seminar for Historical Administration)
http://historyleadership.org/about-sha/

Foundation of the American Institute for Conservation Professional Development Grants & Scholarships
http://www.conservation-us.org/grants-scholarships/professional-development#mellonphotograntt

Getty Leadership Institute at Claremont Graduate University
http://www.cgu.edu/pages/7223.asp

Rockefeller Foundation Effective Convening
http://www.rockefellerfoundation.org/bellagio-center/gather-art-science-effective
NEW PHILANTHROPIC ENVIRONMENTS

Chronicle of Philanthropy
http://philanthropy.com/section/Home/172/

Council on Foundations
http://www.cof.org/

Foundation Center, Foundation Giving Trends
http://foundationcenter.org/

Giving Institute
http://givinginstitute.org/

Internal Revenue Service, IRS Statistics of Income Bulletin

National Committee for Responsive Philanthropy
https://www.ncrp.org/

National Philanthropic Trust
http://www.nptrust.org/who-we-are/press/

Urban Institute National Center for Charitable Statistics, The Nonprofit Almanac
http://nccs.urban.org/

FUNDRAISING IN NEW PHILANTHROPIC ENVIRONMENTS

American Institute for Conservation Emerging Conservation Professionals
http://www.conservation-us.org/publications-resources/careers-in-conservation/emerging#.UvgFqPISb5M

Anna Plowden Trust: Raising Awareness Grants
http://www.annaplowdentrust.org.uk/grants/raising-awareness-grants

Connect U.S. Funds
http://www.connectusfund.org/

Capitalize on Collections Care To Increase Support, Generate Contributions and Donations, Increase Membership and Support, and Stimulate Earned Income

ECPN Webinar, Notes & Comments: Self-advocacy and Fundraising for Personal Research

Foundation of the American Institute for Conservation Professional Development Grants & Scholarships
http://www.conservation-us.org/grants-scholarships/professional-development#mellonphotograntt

Foundations Moving On: Ending Programmes and Funding Relationships
http://www.grantcraft.org/index.cfm?pageId=3756