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A New Generation of Collecting Priorities: Case Studies from the Northwest

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Cover Page Footnote

Many Indigenous peoples, including the Apsáalooke (Crow), Niimiipuu (Nez Perce), Očhéthi Šakówiŋ (Lakota), Piikani (Blackfeet), Seliš (Salish), Shoshone, and Tsétsêhéstâhese (Northern Cheyenne), have traditional claims to the lands upon which Montana State University (MSU) physically sits. Indigenous histories and perspectives inform our work. I'd also like to thank my colleagues at the Montana State University Library, especially the members of my department, for their steadfast work and support and for sharing in the hidden delights that we have found. The University of Oregon is located on Kalapuya Ilihi, the traditional indigenous homeland of the Kalapuya people. Following treaties between 1851 and 1855, Kalapuya people were dispossessed of their indigenous homeland by the United States government and forcibly removed to the Coast Reservation in Western Oregon. Today, descendants are citizens of the Confederated Tribes of Grand Ronde Community of Oregon and the Confederated Tribes of Siletz Indians of Oregon, and continue to make important contributions in their communities, at UO, and across the land we now refer to as Oregon. The WSU Libraries on the Pullman campus are located on the ancestral lands of the Nimiipuu (Nez Perce) Tribe and the traditional homeland of the Palus Band of Indians. We acknowledge their presence here since time immemorial and recognize their continuing connection to the land, to the water, and to their ancestors. The Anchorage Museum sits on the unceded land of the Eklutna Dena'ina. We respectfully acknowledge and honor with gratitude the past, present, and future stewardship of these lands by their peoples, who persist with courage and integrity despite their and their ancestors' many traumas. We would like to thank our colleagues for their contribution to this work, without whom this case study would not be possible: Heather McClain, Archivist, Anchorage Museum; Selena Ortego-Chiolero, Museum Specialist, Chickaloon Native Village; Monica Shah, Deputy Director of Collections, Anchorage Museum; Julie Varee, Community Outreach Archivist, Anchorage Museum. Chin'an.

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ABSTRACT

The last twenty-five years have brought lively, important, and difficult discussions around heritage collections. We are called to broaden our collecting activities to be more inclusive of (among many things) all races, classes, and experiences. We have begun to move away from the troubled legacy of taking collections away from creators and toward empowering those same creators to steward their heritage. We confront a vast universe of current holdings and possible collections and have few models for assessing the opportunities. We also operate with some firm limitations on our budgets, personnel, and space that we have outdistanced with our collecting. The framework of responsible stewardship suggests that we must stop over-collecting. Broader cultural forces call us to make our collections more diverse and representative. Inevitably, both of these mean that we must stop or de-emphasize some collecting in order to make other types possible. Given that our collecting policies outline both our aspirations and limitations, what have we done or failed to do in terms of tending to the collecting policies that we inherited? How have we changed them—or kept them the same? And, moving forward, how do we go about implementing and making public big shifts in our collecting policies? We consider these questions through four case studies from the University of Oregon, Washington State University, Montana State University, and the Anchorage Museum that consider (respectively) two decades of work with LGBTQ+ and indigenous collections, current and clear changes in who is documented, and considerations of capacity as part of stewardship. First presented at the annual meeting of [organization] in May 2023, the case studies spurred lively conversations and are broadly applicable to archives across the west and beyond.

Introduction

The last 25 years have brought lively, important, and difficult discussions around heritage collections. We, archivists, are called to broaden our collecting activities to be more inclusive of, among many things, all races, classes, and experiences. We have begun to move away from the troubled legacy of taking collections from creators and toward empowering those same creators to steward their heritage. We confront a vast universe of current holdings and possible collections and have few models for

assessing the opportunities. We also operate with some firm limitations on our budgets, personnel, and space that we have outgrown in our collecting. The framework of responsible stewardship suggests that we must stop over-collecting.[1] Broader cultural forces call us to make our collections more diverse and representative. Inevitably, both of these mean that we must stop or de-emphasize some collecting in order to make other types possible.

Given that our collecting policies outline both our aspirations and limitations, what have we done or failed to do in terms of tending to the collecting policies that we inherited? How have we changed them, or kept them the same? Moving forward, how do we go about implementing and making public big shifts in our collecting policies? And finally, how do we confront the realities of limited time, space, and budgets to avoid the legacy practice of collecting beyond our capacity?

All of these topics and much more were the focus of a wide-ranging conversation at the May 2023 meeting of Northwest Archivists.[2] Additionally, we found that nearly every session at the conference was considering collecting policies in some manner. The case studies contained herein will address these fundamental questions from the perspectives of four institutions and their approaches to capacity, diversity, legacy, and moving forward to create the future that we aspire to.

Background on Collecting Policies

Throughout this paper, we use several terms that are all related to the process of developing archival collections. *Collection development* refers to "the set of activities and policies associated with acquiring and selecting archival resources;" it is an umbrella term for the overall process.[3] *Appraisal* is "…the process of determining whether records and other materials have permanent (archival) value."[4] It is closely related (and perhaps even interchangeable) with *selection*, "the process of identifying which records to retain because of their enduring value."[5] *Collecting policy*: "guidelines outlining the scope and selection of materials that support a repository's mission… defines the scope of existing collections and also describes processes such as deselection, retention, preservation, and storage. It provides guidance for archives staff, organizations and individuals interested in donating, and other collecting

1. Chela Scott Weber, et. al., "Total Cost of Stewardship: Responsible Collection Building in Archives and Special Collections," 2021, OCLC Research, https://www.oclc.org/content/dam/research/publications/2021/oclcresearch-total-cost-of-stewardship-a4.pdf.

2. "Annual Meeting," Northwest Archivist, accessed April 2024, https://northwestarchivists.org/page-1859020.

3. "Collection development," Dictionary of Archives Terminology, Society of American Archivists, accessed April 2024, https://dictionary.archivists.org/entry/collection-development.html.

4. "Appraisal," Ibid., https://dictionary.archivists.org/entry/appraisal.html.

5. "Selection," Ibid., https://dictionary.archivists.org/entry/selection.html.

repositories." It is used somewhat interchangeably with collection development, acquisition policy, and collection policy.[6] For the purposes of this discussion, we are referring to the process of *collection development*, as governed by the *collecting policy*, and carried out through the process of *appraisal* and *selection*.

For libraries that deal primarily with published materials, collection development is broadly (and admittedly over-simplified) a matter of knowing the scope of a universe of those materials and selecting from that based on mission, policies, and budgets. Paul Mosher has characterized collection development as "a contract between library users and library staff as to what will be acquired, for whom and at what level."[7] In a further expression of that known universe, Johnson identifies environmental scanning, which assesses external social, economic, and technological issues internally, and that externally, may be difficult to observe or predict, but that cannot be ignored and will not go away, as an additional step to identify the universe in which the library is collecting.[8]

For institutional or corporate archives, that universe is similarly knowable, as it is (theoretically) possible to know the scope of the records produced by an organization. But for manuscript collections—regardless of whether they are acquired through purchases, gifts, or both—the universe of possible collections on a chosen topic or other area of focus is something of a black box. If a manuscript collection aspires to collect as comprehensively as possible on even a very specialized topic, it may be impossible to know the full scope of the collection's sources, even with the best developed professional and social networks. Frank Boles writes that this reality often leads practitioners to hesitate to create collecting policies.[9] Many find the whole topic overwhelming; Suzanne Noruschat writes that "selection is a critical function of our work as archivists. Yet it can pose some of the most difficult challenges and feelings of uncertainty."[10]

Related to that inherent black box, we also know that our current record of the past falls far short in including documentation of diverse peoples and experiences. Thomas Hickerson acknowledges this challenge when looking at the current record

6. "Collecting policy," Ibid., https://dictionary.archivists.org/entry/collecting-policy.html. The Dictionary notes that "For decades, the archives profession has not had consensus about the content of a collecting policy or even the proper terminology for such a policy. Archivists borrowed the idea from the library profession and developed it with much debate throughout the 1970s and 1980s."

7. Peggy Johnson, *Fundamentals of Collection Development and Management, Fundamentals of Collection Development and Management*, 2nd ed. (Chicago: ALA Editions, 2009), 73.

8. Ibid., 69-70.

9. Frank Boles, *Selecting & Appraising Archives & Manuscripts* (Chicago: Society of American Archivists, 2005), 65-66.

10. Suzanne Noruschat, "Selection as an Archival Value," in *Archival Values: Essays in Honor of Mark Greene*, eds. Christine Weideman and Mary A. Caldera (Chicago: American Library Association, 2019), 139.

of the past: "I am aware of the extent to which our preserved record of the past is remarkably incomplete and that we have limited knowledge of how and why and to what extent it is incomplete."[11] The universe of possible collections is not only unknowable, but abundant. Gerald Ham acknowledged this almost 30 years ago.[12] One tangible outcome is that because our predecessors of the 1960s and 1970s so often used the "vacuum cleaner" method of collecting, many of us have spent our careers madly reappraising and deaccessioning collections that no longer fit our ever-limited resources. The late Mark Greene was in the first part of that generation, observing a full 25 years ago that "Despite lip service to having breached the transition to 'an age of abundance,' we as a profession have not devised or embraced a practical means of refining our acquisition and appraisal approaches to fit our goals and resources."[13] At the same time, the age of abundance has only been enhanced. Michael Moir writes:

> *Both within and beyond the walls of the academy, an aging generation struggles to resolve the fate of their papers and libraries… Many baby boomers and their families turn to academic libraries to secure their cultural legacy… But what are archivists and librarians to do?* At a time when the availability of potential donations far outstrips the resources available to preserve this material and make it accessible, how do libraries ensure a reasonable return on the investment of diminishing funds through collections use by the burgeoning ranks of new faculty and graduate students with new and sometimes unpredictable research interests?[14] [author's emphasis]

A major response to this abundance is the concept of responsible stewardship, where Greene's generation of professionals has sought to not repeat the over-collecting of their predecessors and to define and measure how to do that. This, in turn, has at least two sub-features: transitioning away from exclusive focus on custody to post-custodial models, and to the concept of stewardship as matching aspirations to resources.

Michelle Light articulates both the importance of and the process of SAA adopting the concept of stewardship rather than custody over the course of the 2010s. Grounded in Mark Greene's 2008 presidential address, the process to reconsider

11. H. Thomas Hickerson, "Rebalancing the Investment in Collections," *Research Library Issues: A Report from ARL, CNI, and SPARC* 277 (December 2011), 2.

12. F. Gerald Ham, "The Archival Edge," *The American Archivist* 38, no. 1 (1975): 5-13, accessed April 2024, https://doi.org/10.17723/aarc.38.1.7400r86481128424.

13. Boles, *Selecting & Appraising Archives & Manuscripts*, 66. Quote from: Mark Greene, "'The Surest Proof': A Utilitarian Approach to Appraisal," *Archivaria* 45 (1998).

14. Michael B. Moir, "Patron-Driven Acquisitions and the Development of Research Collections: The Case of the Portuguese Canadian History Project," *Research Library Issues: A Bimonthly Report from ARL, CNI, and SPARC* 283 (2013), 6.

custody in SAA's Core Values Statement was initiated by SAA council member Light who thought that "custody seemed like a remarkably old-fashioned concept for 2011." Her article "From Responsible Custody to Responsible Stewardship" highlights the postcustodial debates in an electronic records environment while advocating for cultural sensitivity in native or colonial archives, and in turn, articulates new models for stewardship associated with the community archives movement.[15] The latest version of the Core Values Statement uses "stewardship" rather than "custody" and was approved by SAA Council in August 2020. It also states the other core meaning of stewardship as "considering a repository's realistic capacity for care when deciding to acquire or deaccession materials."[16] Light argues for collecting models that put a greater emphasis on people rather than materials:

> *As we replace custody with stewardship, we also should put people, rather than holdings, first. This core value… can demand that archivists consider their relationships to people—in the past, present, and future—and the consequences of their decisions on people in managing archives or offering archival services. By prioritizing archivists' obligations to people, this core value can accommodate evolving practices to treat archives as shared investments managed collaboratively with a community*.[17]

Another major change in the field of archives is the emerging importance of decolonizing practices, defined as: "to collaborate with Indigenous peoples to implement greater Indigenous control over records, to provide a voice to those peoples through records, and to recontextualize the records and institutions created and interpreted by settler populations."[18] In a field with limited resources and backlogs as norm, decolonizing practices and collections can feel overwhelming. However, inaction is just as problematic as a biased cultural record. It is important to assess existing collections against the archives' written or implied collecting scope with consideration for the holdings of other local repositories and the needs of the community. Regular review of collections against scope and collecting goals can justify narrowly defined collecting practices determined by narrative gaps and critically limited resources. With space at a premium, archives must prioritize collecting the historically marginalized perspectives missing from archival narratives. Implementation of a framework based in equity allows archives to preserve an accurate historical record and incorporate decolonization efforts in all processes,

15. Michelle Light, "From Responsible Custody to Responsible Stewardship," in *Archival Values: Essays in Honor of Mark Greene*, eds. Christine Weideman and Mary A. Caldera (Chicago: ALA Editions, 2019), 97.

16. "SAA Core Values Statement and Code of Ethics," Society of American Archivists, accessed April 2024, https://www2.archivists.org/statements/saa-core-values-statement-and-code-of-ethics.

17. Light, 108.

18. "Decolonizing," Dictionary of Archives Terminology, Society of American Archivists, accessed April 2024, https://dictionary.archivists.org/entry/decolonize.html.

including collecting scope and policy. While archives may lack the resources to systematically and perfectly decolonize collections, even small change is still progress. Regardless of progress in the decolonization process, it is vital to remain transparent about the state of collections, the ideals archivists are working toward, and the limitations faced. Without transparency, the goal of an inclusive and accurate cultural record is tainted with hypocrisy.

Archivists may know where we need to change our practices, but the current literature includes very little comprehensive guidance or models for actually doing so. In the 2005 SAA Fundamental series volume that includes a guide to developing a collecting policy, Boles refers to classic archival literature published in the 1970s and 1980s when we were arguably still in the era of "vacuum cleaner collecting."[19] He offers a logical model for both policy development and selection processes that includes: defining current goals; understanding how past actions have shaped the collection; determining the documentary universe through research and relationship building; prioritizing and defining desired subjects, functions, and level of documentation; and selecting; along with periodic updates.[20] What is useful about this model is that it can be adapted to many emerging and current practices around increasing diversity, new ethical approaches to indigenous or colonial materials, and community archiving. However, and especially given Light's call for much more people-centered approaches, we as a profession fall far short of what we need to truly move forward in our quest to be effective stewards in an age of abundance. Boles' volume is under revision and the new one will undoubtedly give the profession a new framework for considering these questions.[21] In the meantime, case studies from a group of institutions in the Northwest United States can offer some tangible examples of how we are all wrestling with critical issues of inclusion, institutional capacity, and professional ethics as we move forward into 21st century collecting.[22]

Institutional Case Studies

Linda Long, University of Oregon

With a stated goal of avoiding indiscriminate collecting and building leaner and more focused collections, curators at the University of Oregon periodically revisit and

19. Boles, 66-67.

20. Boles, 98-116.

21. The Society of American Archivists has encountered significant delays and a change of editor. Boles' volume is back on track with a new release date. Personal communication, Abigail Christian to Jodi Allison-Bunnell, August 11, 2023.

22. Montana can arguably be considered to be part of the Rocky Mountain West or the Intermountain West rather than the Northwest. This paper began with a conference session at the Northwest Archivists (https://northwestarchivistsinc.wildapricot.org/) annual meeting, which includes Montana in the scope of its member states.

review the collection development policy to compare its stated collecting areas and strengths with current scholarly research trends. These trends became evident through conversations with faculty and graduate students, conferences held on campus, and inquiries made by prospective researchers to our repository. One such research area is gender and sexuality. Collections in this area have grown significantly over the past 30 years. We have worked to collect documents related to women's history and LGBTQ+ materials and to make them accessible and visible to both scholars and the larger community.

Lesbian photographer, artist, activist, and Oregonian Tee Corinne once said, "The lack of a publicly accessible history is a devastating form of oppression. Lesbians face it constantly."[23] As a researcher and writer, Corinne had been frustrated by the lack of sources on the topic of interest to her—the history of lesbian photographers. She recognized the importance of the archival record as demonstration of the reality and truth of lives lived. But Corinne was not alone; scholars and artists alike experience frustration when trying to locate primary sources relating to LGBTQ life. Many records of the LGBTQ community have been destroyed due to shame by family members or, if collections found their way into a repository, were deemed insignificant by archivists or catalogers who suppressed that information unconsciously or on purpose. Thus, many LGBTQ materials and collections were overlooked or never considered worthy of archivists' attention. As Amy Stone and Jaime Cantrell state in their book *Out of the Closet, Into the Archives: Researching Sexual Histories*, "LGBT life is 'hidden from history,' obscured within existing sources or discarded entirely. Thus, LGBT archival research becomes queer when it becomes part of a process of recovery and justice."[24] As a lesbian archivist, I, Linda, took Corinne's desire for "a publicly accessible history" to heart when I began to develop lesbian-focused collections in the University of Oregon Libraries' Special Collections and University Archives.

Soon after I arrived to work at the University of Oregon in 1996, during one of my walks through the stacks to familiarize myself with numerous unprocessed collections, I came across 30 record storage boxes marked "Jean and Ruth Mountaingrove." The boxes contained title after title of lesbian periodicals—*Lesbian Tide*; *Leaping Lesbian*; *Lesbian Connection*; and *Lesbian Insider Insighter, Inciter*, amongst others. I realized that I had stumbled upon a rare grouping of lesbian and feminist periodicals from the 1970s, '80s, and '90s. I knew that many of the titles could be found, individually, in libraries across the country but that holistically, this formed a valuable concentration of titles that could be extremely useful for research. In that moment, I had what we archivists sometimes call that "tingly" feeling when

23. "Lesbian Oral History Project to Become Part of UO Collections," University of Oregon, September 10, 2018, accessed Aril 2024, https://around.uoregon.edu/content/lesbian-oral-history-project-become-part-uo-collections.

24. Amy L. Stone and Jaime Cantrell, eds., *Out of the Closet and Into the Archives: Researching Sexual Histories* (Albany, NY: SUNY Press, 2015).

we realize that we've found something really valuable in our collections. I was eager to have the collection processed, and I also wanted to ensure the word "lesbian" was used in the title and as many times as possible in the subject headings: "Lesbians' writings—Periodicals", "Lesbianism—Oregon—Periodicals", "Lesbians—United States—Social life and customs—Periodicals", and so on, making the processed collection widely accessible and overtly named through discovery tools. This collection has since proved to be a magnet for research on lesbian life and culture. But in that moment of discovery, I was also curious about the donors—who were Jean and Ruth Mountaingrove? And what an interesting shared last name! I was excited and eager to learn more.

I was lucky to find a donor file for Ruth Mountaingrove and contacted her. During our conversations, I learned from Ruth and her partner Jean that southern Oregon is home to nearly a dozen separatist lesbian intentional communities, or "communes" as they are sometimes called. Ruth and Jean took their shared last name from a heterosexual commune they had initially lived in, called "Mountain Grove". Many of these communes are collectives (many are privately owned) but all together, they form an established community of lesbians wanting to live separately from men and in their own living spaces. I visited Ruth and learned more: the settlement of lesbian land communities in southern Oregon was a component of the larger Back-to-the-Land movement in the late 1960s and 1970s when many Americans wanted to escape urban life and live closer to nature. These women felt the women's movement was moving too slowly and asked themselves: When would equality come? When would the world cease being patriarchal, heterosexist, and heteronormative? They looked to separatism as a way to live freely among themselves without these dominant assumptions of contemporary American society, and to be able to remove themselves from the hostility they felt from the mainstream women's movement.

I soon realized that there was a rich history in these lesbian communities and that there must be records and personal papers that documented this history. I learned from Ruth that Tee Corinne was also living in the southern Oregon lesbian community, and I contacted her, too. With Ruth Mountaingrove and Tee Corinne helping me, I was able to acquire many personal papers and records that document the lesbian land community and, with the help of other archivists, make them available for research. It was very clear to me that had I not identified the lesbian periodicals in the stacks with an awareness of their potential research value, I would not have been able to connect the dots to the lesbian community in southern Oregon. Through donor relations outreach over the past twenty-some years, I have been able to acquire the personal papers of individuals and the records of these lesbian land communities—now totaling some 20 individual collections (and counting!). Through these collections, we have managed to save a part of Oregon history. Because this grouping of material is one of the most frequently and consistently used collection in our repository, this collection development effort is a clear example of how an archivist's ultimate goal of providing access to collections supports researchers who can then advance scholarship.

Gender and sexuality studies comprise but one focus contemporary scholars want to research. As research interests change over time, collecting interests should change, too. While periodically re-examining their holdings, archivists must acquire collections that reflect the diversity of human experience. This imperative is beautifully explored in Mary Caldera and Kathryn Neal's edited book of essays, *Through the Archival Looking Glass: A Reader on Diversity and Inclusion*, Michelle Caswell's essay, "Teaching to Dismantle White Supremacy in Archives", and the wonderfully accessible poster produced during her class at UCLA, "Identifying and Dismantling White Supremacy in Archives."[25, 26] At the University of Oregon, most of our researchers are studying some aspect of the legacies of the systems of oppression—racism, sexism, homophobia, antisemitism, and/or settler colonialism—since these legacies are extant in numerous collections. As we archivists now reexamine our collection development policies to think critically about what we collect and how much we collect in an effort to be more responsible managers of our collections, we must think about the kinds of records scholars are hoping and needing to see.[27] With the capacity to develop collections and curate them, archivists have the authority to determine the growth, depth, and scope of collections and to be mindful of the pitfalls of over-collecting. At my repository, we are aware of limiting our growth to collections that specifically meet our collecting policy, and our priority lists for processing collections is adjusted annually to reflect researcher interests. Most recently, for example, we've processed and made available the Eugene Lesbian Oral History Project (local history and culture), the Sally Gearhart Papers (feminist science fiction), and the Norma Hotaling Papers (regarding prostitution and sexual exploitation).

As is the case in most manuscript repositories across the country, researcher interest in unprocessed collections and demands to process them exceed the capacity level of processing staff. Reappraisal at the University of Oregon in the last 20 years has resulted in the deaccessioning of only one large collection, but this process has helped us to focus processing and cataloging efforts on collections that more closely reflect contemporary researcher interests. While all of our collections do still fall within our broad collecting scope, not all of these collections are in demand. Although we have many Oregon Trail diaries and other pioneer collections available, we rarely get researchers who study the glorification of white settler colonialism of the so-called frontier West. In our current political times when we see the rights of marginalized groups under threat, scholars are focusing on questions relating to racism, sexism, the environment, and white supremacy, and turning to collections that may answer these questions. It's compelling to see the changes in research

25. Mary Caldera and Kathryn Neal, eds., *Through the Archival Looking Glass: A Reader on Diversity and Inclusion* (Chicago: The Society of American Archivists, 2014).

26. Michelle Caswell, "Teaching to Dismantle White Supremacy in Archives." *Library Quarterly: Information, Community, Policy* 87, no. 3, 22-235.

27. Chela Scott Weber, et. al., *Total Cost of Stewardship*.

interests. While we no longer deliberately develop our extensive collections on anti-communist work in the mid-20th century, we have seen an increase in scholars' interest in these collections after the U.S. Presidential election in 2016. These scholars are searching for answers to fundamental questions such as: How did the far-right political movement start? What are the antecedents to this political wave? Answers can be found in the anti-communist work of individuals many, many decades ago. Similarly, today's scholars rarely access the numerous timber industry collections at the UO. Where researchers used to consult these collections to revel in the successful timber industry and the growth of Oregon's economy, scholars now could use the materials to examine the effects of indiscriminate corporate destruction of old growth native forests when researching climate change, for example.

Conclusions

My experiences as an archivist at the University of Oregon are undoubtedly echoed by the experiences of many other archivists across the US. As we reappraise our collections and responsibly manage them, questions about use of collections, the sometimes-overwhelming volume of collections, and the imperative to develop collections that parallel the range of contemporary researcher interests will arise. In particular, Michelle Caswell's work on dismantling white supremacy in the archives provides a roadmap to help archivists develop both collections and a diverse staff to create and make accessible collections that reflect researchers' interests and needs.

With limited stacks space, coupled with our mandate to acquire and manage collections responsibly as a part of our charge to preserve the primary source evidence of our cultural past, it is important for archivists to institute periodical reappraisals of collections. Although we have guidance in SAA's Guidelines for Reappraisal and Deaccessioning, reappraisal and deaccessioning can be an expensive proposition and labor intensive. But we will likely discover that many collections acquired years ago by our predecessors are no longer germane to our collecting areas. Currently at the University of Oregon, we often decline offered collections while continuing to build deep and rich collections with the guidance from our collecting policy. When declining collections, we will search for pertinent repositories and help potential donors connect with archivists in those repositories. The collection databases Archives West and ArchiveGrid are particularly helpful for locating alternative repositories.

Aiming to enact these new commitments and collection policies at our institution has accomplished these goals. I have developed collections focused on LGBTQ materials, providing researchers with primary resources not previously available. To see scholars coming to Eugene from across the country and from around the world is very gratifying indeed. Since 2000, we've had a steady stream of researchers from North America and numerous international researchers coming specifically to access these new materials. What began as a serendipitous moment, discovering these materials led me to purposefully update our collecting priorities. To date, we have increased the LGBTQ materials from a scant 43 linear feet to a substantial 600 linear feet of shelf space. Our efforts have strengthened and

reinforced my institution's commitment to diversity and inclusion. My own lifelong and personal dedication to women's history and social justice has found a way to blossom in my professional career.

Trevor James Bond, Washington State University

We think and act differently about collecting manuscripts and archives than we did when I, Trevor, started in the Washington State University Libraries department of Manuscripts, Archives, and Special Collections (MASC) in 1998. After a period of voracious collecting from the late 1970s to the 1990s, our mostly full shelves and massive backlog created a reckoning. We had to get a handle on the intellectual and physical control over our archival collections. This work, combined with a slowing of collecting, and the development of new digital projects to provide better access, led to a new ethos. In the past, our department sometimes saw other repositories as competitors—this spirit of competition is no longer with us. We just as often consider a better home for an offered collection than accepting it. As we are in the midst of a new era of adjusting our acquisition of collections, I appreciate this opportunity to articulate some of these changes.

In 1998, John Guido, MASC department head from 1978 to 1997, had recently retired with the consolidation of two divisions at the WSU Libraries—Manuscripts & Archives with Rare Book & Humanities. Guido was by all accounts a collector; he collected voraciously and when he retired, he left a department with mostly full shelves and a massive backlog that took decades to address. MASC was far from being an outlier in collecting on this scale.

For decades, my colleagues reaccessioned thousands of collections and in the process, created short finding aids for all of our collections. Many of these are preliminary guides for unprocessed materials. Cheryl Gunselman, manuscripts librarian from 2000 to 2019, oversaw much of this work, while metadata wizard Suzanne James-Bacon created, updated, and connected EAD preliminary guides to catalog records in our ILS (Alma) and in our regional EAD aggregator, Archives West. With the implementation of ArchivesSpace, we are now able to manage all of our metadata for manuscript collections (and an increasing number of collections in the University Archives) in that system.

In recent years, we have continued to add and accept new collections, but much more sparingly. For the first time in my career, we truly have a physical and intellectual handle on thousands of collections, most of them nearly impossible to find previously. As a researcher and administrator, it brings me constant joy to locate materials that I did not realize we held.

In the process of reaccessioning collections and creating preliminary finding aids, it will be no surprise that most of our collections in MASC were of white males, with woman and all communities of color grossly underrepresented in our holdings. To address this imbalance, we began shifting our collecting focus and starting new oral

history projects, including a series of COVID oral histories in which WSU graduate Nikki Brueggeman interviewed diverse students and faculty to document their experiences.[28]

Another model for surfacing diverse perspectives draws upon long-term partnerships with Tribal Archives Libraries and Museums (TALMs) as part of the Plateau Peoples Web Portal.[29] Tribal partners on the Portal select the digitized collection items to include on the site; they may also add community records and other forms of traditional knowledge to these materials. This is not collecting in the sense of ownership of materials in the department; rather, it is capacity building and supporting the sharing of indigenous knowledge. However, the end result is similar in that new primary sources are made available online. These interpretations provide rich context for materials online and often include information not found elsewhere in the scholarly record. One example of this is a video recorded of Leroy Seth (Nez Perce) who spoke of an incident in which his ancestor piyopyóot'alikt (Peo Peo Tholekt), a noted warrior in the 1877 Nez Perce War, heard from frightened family members of a KKK gathering near Spalding, Idaho. An elderly man at the time of this incident. piyopyóot'alikt grabbed his pistol and rode his horse into the hooded crowd, firing his gun in the air and dispersing the Klan members who fled for their lives. Seth finished the story by remarking, "piyopyóot'alikt…was one proud warrior that decided to get rid of those people."[30]

Another model for collection building in partnership with TALMs is to ask what they would like digitized. After agreeing to the scope of a project, WSU Libraries scans materials and creates metadata for the collections and then returns the original materials, scan files, and metadata to our TALM partner who then decides if the collections are to be made public or kept for community use only. One example of a completed project is the 30 volumes of the *Yakama Nation Review* newspaper.[31]

These days when collections related to Indigenous communities are offered by donors, we consult with our colleagues at TALMs to determine the best location of resources. If these collections are offered through dealers, we also consult with TALMs for advice on whether we should purchase them or not. For collections with sensitive cultural materials such as traditional music, we defer to our colleagues who are in a more appropriate location to facilitate access requests for sensitive materials.

28. "The #DocumentingCOVID19 Oral History Project, 2020-2021," WSU Libraries, accessed April 2024, https://content.libraries.wsu.edu/digital/collection/Covid19.

29. For more information on the Plateau Peoples' Web Portal see: https://plateauportal.libraries.wsu.edu/about.

30. "Leroy Seth's Discusses His Ancestor piyopyóot'alikt," Plateau Peoples' Web Portal, accessed April 2024, https://plateauportal.libraries.wsu.edu/digital-heritage/leroy-seth-discusses-his-ancestor-piyopy%C3%B3ot%E2%80%99alikt-peo-peo-tholekt.

31. "Yakama Nation Review Newspapers," Plateau Peoples' Web Portal, accessed April 2024, https://plateauportal.libraries.wsu.edu/collection/yakama-nation-review-newspapers.

For example, the Nez Perce Music Archive, assembled over decades through the fieldwork and the connections of retired WSU ethnomusicologist, Loran Olsen, was initially to be housed in MASC with Dr. Olsen's papers. Instead, and after consultation with Dr. Olsen and others, the Nez Perce Music Archives went to the Nez Perce National Historic Park (NEPE). Many of the recorded songs require cultural vetting for access and use, and Dr. Olsen fielded such requests for decades. However, as he could no longer continue this work, we agreed that transferring the records to NEPE made the most sense since the Park is located on the Nez Perce Reservation with nearby access to Native staff and the Nez Perce Tribe's Cultural Resources Department to review future access and use requests.

Another model of community engagement and collection development is a recent grant from Washington State Library, awarded to my colleagues Lotus Norton-Wisla (MASC Community Outreach Archivist) and Josie Cohen-Rodriguez (WSU LGBTQ+ Center Student Life & Community Coordinator). Their proposal is titled "Washington State University (WSU) Intersectional Queer Community-Driven Archives Initiative: Connecting Community Voices to LGBTQ+ History in Eastern Washington."[4] For the project, Norton-Wisla and Cohen-Rodriguez will work together across departments and in collaboration with students, faculty, and community members to support the beginnings of archiving queer history at WSU and in the Palouse region of Eastern Washington. In preparing their proposal, they traveled to Oregon to learn from Linda Long (University of Oregon), Natalia Fernández (Oregon State University), and Shawna Gandy (Oregon Historical Society). The grant work also includes an oral history component.

Collecting will remain important, but I think that it will look different than it did a generation ago. With sustained interest in digitization projects supported by grants and donations, we will continue this work. Furthermore, new digital tools and ongoing projects, such as the Plateau People's Web Portal, allow us to share knowledge from multiple perspectives more broadly. Having worked in MASC for nearly 25 years, I am mindful that the work we are doing now will be judged by our successors. Just as my colleagues and I sometimes question earlier collection decisions (why *did* we accept and process so many bank ledgers from Pullman, Washington?), I think my successors may view our focus on outreach and engagement, or finding more appropriate homes for collections, with puzzlement. Regardless of their views on the merits of our activities, they will find a department with allies and supporters both within the WSU system as well as regional repositories around the Northwest. And, after concerted effort over decades, we are supported externally by the generosity of individual donors (along with private, state, and federal grants) in support for digitizing collections. This has resulted in the creation of multiple endowments and graduate fellowships so that, as we no doubt have made some questionable decisions regarding collecting, there will be resources to support the future work of the department. And with new positions, such as a digital projects manager and community outreach archivist recently added to the department, we have talented individuals to move the department forward to be more accessible and inclusive in our collections and operations.

From the Long Game to the Present

The preceding case studies have addressed the work that the University of Oregon and Washington State University have carried out over the last twenty years to reappraise, deaccession, focus, and diversify their collections going forward. The following case studies cover the more recent work being done at the Anchorage Museum and Montana State University, carrying on some of the same themes while addressing issues of diversity and capacity.

Chloe Nielsen & Amy Valentine, Anchorage Museum

The Anchorage Museum collection highlights the environment, people, and cultures of the Circumpolar North, connecting people while building relationships and common understanding. The Museum's vision is to grow the collection through material culture and works that help tell the story of the environment, people, and cultures of Alaska and the Circumpolar North in a way that informs conversations and ideas about the North and its future. The collections have grown since the Museum's founding in 1968, spanning an estimation of over 15,000 library materials, over 27,000 art and cultural belonging items, and over 780,000 photographs and archives. The Museum's stewardship honors the stories and legacies of these items now and for future generations.[32]

The Anchorage Museum Collections Department began decolonizing procedures and programs in 2012 with institution-wide decolonization efforts, following with the 2020-2026 Strategic Framework. Within the Collections Department, which stewards cultural belongings and archives, projects, and policies are determined by the four Strategic Framework initiatives. These initiatives aim to center equity and inclusion, foster reciprocal relationships, steward together, and embed resilience. These principles uphold the Museum's mission as a "place for people, planet, and potential, in service of a sustainable and equitable North, with creativity and imagination for what is possible."[33] This case study focuses on the policy and procedural shifts within the Anchorage Museum Archives that aim to better represent past and present Anchorage communities. It will describe the practices and challenges of implementing innovative collecting policies over the last three years and discuss practical applications for decolonizing the historical record.

32. "Collections," Anchorage Museum, accessed April 2024, https://www.anchoragemuseum.org/collections/.

33. "Strategic Framework 2020-2026," Anchorage Museum, accessed April 2024, https://www.anchoragemuseum.org/media/20943/am_strategicframework_r02.pdf.

Themes and Projects

Informed by institutional shifts, trends in the field, and current collections, it has been necessary to update the Museum's collecting scope. With a new sense of direction and through equitable community collaboration, the archives team have refined our policies and collecting scope to include community-specific exceptions and models of shared or forfeited control. These new policies and procedures aim to dismantle historically oppressive systems of power in favor of community self-determination and agency. Further, with the prioritization of accessibility and inclusion through digitization and content creation, we aspire to foster an approachable and welcoming archives experience.

Archival Collections and Policies

The Anchorage Museum opened in 1968, at which time the collections of the Cook Inlet Historical Society (CIHS) were loaned (and later transferred) to the Museum, forming the basis of its collections. Based on CIHS records and early accessions, the Archives' collecting scope focused primarily on photographs documenting Alaskan history as defined by white settlers, though initial collecting did not limit other formats.[34] In 1996, a collecting policy formalized the Archives' focus on its Alaska and Northern photographic collections, with active collection of relevant maps and design records, and acceptance of relevant unsolicited manuscript collections.[35] Staff continued to solicit collections for donation or purchase, though collections did not undergo consistent review for deaccession. As a result, archival storage was left with less than one aisle of condensed shelving open for incoming collections by 2020, despite a large expansion only a decade prior.

Facilities

In 2009, the Anchorage Museum expanded its facilities to include the current archives and library spaces. The archival and library collections were moved from an overcrowded space to a larger space that separated storage from research spaces. Following the design vision of the expansion architects, the new archives' public space featured a sterile, industrial aesthetic with grayscale furniture, cabinetry, and concrete structural elements. Despite this expansion, archival storage space quickly became limited. This situation was further exacerbated by a 2017 accession that nearly doubled the archives' photographic holdings. This lack of space limits how much new collection material staff can accession in the future, which could in turn prevent the preservation of historically marginalized communities' experiences. Further, the unwelcoming, cold aesthetic space design, combined with a portrayed elitist academic stigma of archives, served as access barriers to community members, particularly those without prior archival experience.

34. Cook Inlet Historical Society Records, B2017.013, Anchorage Museum.

35. Wilda Marston et. al., *Anchorage Museum of History and Art Collections Policy* (administrative document, Historical and Fine Arts Commission/Anchorage Museum, 1996).

Limiting Scope

Through the lens of a new 2020-2026 Strategic Framework which centers on equitable inclusion and reciprocal relationships, the Anchorage Museum Archives reviewed its collections and found a biased representation of Anchorage communities. To amend this inaccurate representation of Anchorage, Archives staff revised the collecting scope to ensure that future acquisitions equitably preserve underrepresented histories. Rather than considering any Circumpolar North collection, we now only collect photographic collections that represent the past and present people and land of Alaska, provided the narrative does not already exist in our repository. We no longer solicit collections generated from white experiences but rather seek BIPOC histories and perspectives. Further, we have shifted our approach to understanding and gathering these underrepresented stories. While collecting remains part of the work, it is no longer the primary goal. Instead, we prioritize relationship building through outreach and offering resources and services. In response, members of BIPOC and other historically marginalized communities have unexpectedly reached out to explore partnerships with the Anchorage Museum, including potential collection donations. Since 2021, and through the actions and the efforts of the Community Outreach Archivist, ten new BIPOC collections have been accessioned with five more in various stages of the acquisition process.

Prioritizing Underrepresented Community Access

To strengthen the department's relationships with BIPOC donors, we prioritize making our resources accessible to their communities. One effort has been the redesign of our public archives space. As Joanne Evans, Shannon Faulkhead, et al. state regarding archives, "positive systemic change comes about where there is equity, enabling stakeholders to have voice and agency in design, development and implementation processes."[36] So in 2020, the Community Outreach Archivist Julie Varee, mindful to prioritize BIPOC participants, surveyed community members for their impressions of and suggestions for the archives. The most frequent recommendations were to add warmth to the space, to visually indicate what an archive is, and to utilize the space's potential for gathering.

Since then, we have added wood paneling to existing cabinetry, color, a Dena'ina-first welcome message, wall and window vinyl reproductions of archival photographs, and a birch veneer gathering table. The photographs visually communicate repository holdings while depicting exclusively women, and largely BIPOC women, in hopes that underrepresented onlookers will feel a sense of belonging.

Digital efforts also contribute to community accessibility. Thanks to the hard work of former interns, patrons can utilize subject guides to locate collections that

36. Joanne Evans et. al., "Indigenous Archiving and Wellbeing: Surviving, Thriving, Reconciling," in *Community Archives, Community Spaces: Heritage, Memory and Identity*, eds. Jeannette Bastian and Andrew Flinn (London: Facet Publishing, 2020), 129-148.

represent non-Indigenous BIPOC Alaskans, women in Alaska, and environmental injustices.[37] Incoming collections from underrepresented communities are viewable entirely online, as an equitable policy exception described below.

Policy Exceptions

In addition to refining the Archives' collecting scope, we have instituted policy exceptions as an equitable practice when accessioning and processing incoming BIPOC collections. As a photographs archives, we do not accept objects as policy and only accept paper records when they add context to the photographic materials. However, the Black community of Anchorage has expressed that accolades (e.g., plaques, statuettes, certificates) are necessary to fully represent their history within an archival context. Although these accessions have required creative storage solutions, the goal is to honor self-determination as a commitment to change and justice. In turn, accolades have now become a standing policy exception for collections donated by Black Alaskans. In the same vein, the Polynesian Association of Alaska expressed a desire to include seashells in their collection as an important tie to the community's homeland. After careful consideration for how to feasibly care for these items, we ultimately returned the shells—pest management and object fragility concerns were too great to overlook. Going forward, such exceptions will be determined equitably on a case-by-case basis and set precedents for future exceptions.

Katie Chilton and Ramesh Srinivasan assert that archivists must actively engage marginalized communities in the appraisal, arrangement, and description of collections in order to create a representative, empowered archives.[38] At the Anchorage Museum, most donors are not involved in archival collection processing beyond biographical context and photo identification. However, to decolonize our policies and holdings, we honor community agency by treating incoming BIPOC collection arrangement and description as a collaborative process. Additionally, our standard policy for new accessions is to digitize a small sample of each collection with its corresponding finding aid. If a donor desires their collection to be digitized in full, they are required to pay for that service. However, we have implemented a permanent exception for BIPOC collections, which we digitize in entirety at no cost for optimal access.

Saying No to Unsolicited Collections

Limiting our archives collecting scope has meant declining unsolicited donation offers. This can be challenging as potential donors often have emotional connections to their materials. However, we have found that donors often understand storage

37. "Subject Guides," Anchorage Museum, accessed April 2024, https://www.anchoragemuseum.org/collections/subject-guides/.

38. Katie Shilton and Ramesh Srinivasan, "Counterpoint Participatory Appraisal and Arrangement for Multicultural Archival Collections," *Archivaria* 63 (Spring 2007): 87-101.

limitations and written collection policies as the reason for refusal. To address limited space, archives staff routinely assess library materials for discard, consider archival holdings for reappraisal or deaccession, and reorganize both collections to maximize space. To justify collecting restrictions, the Collections Department is formalizing a procedural manual with clear written scope and policy exceptions. When possible, we refer potential donors to more appropriate repositories and offer preservation advice should they retain their collections instead.

For example, the Anchorage Museum was recently offered a large collection of personal photographs of the 1964 Earthquake. While the Museum would be the appropriate repository for these photographs, the collections already in our care fully represent the event from a white settler perspective. Though under previous policies, the collection would have been accessioned, the archives team declined under our current scope and policies. We would only accession such materials if the donation documented the perspective of a historically marginalized community or individual.

Partnership with Chickaloon Native Village

Nationally, there has been much discussion on decolonizing LAMs, but there are few institutions that have made significant changes in collection practices or repatriation beyond what is mandated by the Native American Graves Protection and Repatriation Act (NAGPRA). The federal law requires federally funded museums to return Indigenous ancestors, funerary objects, sacred objects, and objects of cultural patrimony to their communities.[39] While NAGPRA guidelines may not apply to most archives, the Anchorage Museum is taking the next step to relinquish power and to support the relationships between collections and the people who originated them. The goal is to contest colonial practices and to better reflect Indigenous knowledge systems.

Currently, the Museum is collaborating with Nay'dini'aa Na'/Chickaloon Native Village (CNV) to virtually repatriate associated archival records back to the community. Within the context of this pilot project, "Decolonizing Through Virtual Repatriation: A New Vision of Collections Access," virtual repatriation is defined as the transfer of digital surrogates of archival images to CNV wherein the Tribe receives copyright ownership, earns use fees, and determines access permissions for select images. While not a traditional repatriation, this project dismantles oppressive power systems by relinquishing control and rejecting the role of gatekeeper over historical records.[40] Additionally, the Museum provides honoraria to CNV community members who contribute their time and expertise to this project. This compensation model, outlined in the Anchorage Museum Creative Practice and Community Co-Creation

39. "Native American Graves Protection and Repatriation," United States Code Office of the Law Revision Counsel, accessed April 2024, https://uscode.house.gov/view.xhtml?path=/prelim@title25/chapter32&edition=prelim.

40. "IMLS Museum for America, Collections Stewardship Narrative," Anchorage Museum, 2020.

Compensation Guidelines policy, recognizes the importance of equitable payment for each contributor's essential role in collaborative, community-centered change-making.[41] To be effective community partners, the Archives must do more than relinquish institutional power; people must be paid for their labor.

Right of First Refusal

The Anchorage Museum Archives also relinquishes collections control through a right of first refusal procedure. If offered unsolicited collections that document historically marginalized communities, we direct donors to that community's cultural heritage organization for right of first refusal. If that organization declines the donation, then we consider the collection for accession. For example, if offered photographs that represent Alutiiq/Sugpiaq or Unangax̂ people, we would ask the potential donor to offer them to the Aleutian Pribilof Islands Association before we would consider accepting.[42] If a collection is not represented by a community-defined organization, we look for a broader organization, such as the Alaska Native Heritage Center, or for a tribal government for decisions on control and ownership.

Discussion

Though worthwhile and successful, these decolonization efforts have been challenging and have required openminded flexibility. In the case of the Archives' facilities redesign, the bulk of the work took over three years to complete and a few details remain unresolved. Accessibility and functionality were overlooked in some aspects of this project in favor of an overall institutional design. But despite the challenges, the benefits of a welcoming and community-informed space are invaluable; we receive regular positive feedback and have noticed an improvement in new visitors' comfort levels.

Modifications to policies and workflow expectations may be required when working with new partners of various cultural backgrounds and practices. In collaboration with CNV, the archives team immediately learned to prescreen the collections we pulled for community members to view, out of respect for their mental health and time. Due to busy summer and cultural schedules, scheduling conflicts resulted in more prescreening sessions (where staff reviewed collections for relevant materials) and fewer community visits than expected. Similarly, the unexpected availability of community members with specific interests required quick staff research turnarounds to accommodate last-minute visits. Further, we were humbled to learn that our initial response to problematic materials was insufficient. Listening to the needs and expertise of CNV representatives has allowed us to refine and formalize sensitive content and restriction procedures. It is important to remember

41. "Creative Practice and Community Co-Creation Compensation Guidelines," Anchorage Museum, 2023.

42. Aleutian Pribilof Islands Association, https://www.apiai.org/.

that while these processes will never be perfect, we aim for the best and most informed practice possible, acknowledging and expecting constant change.

Conclusion

Going forward, Anchorage Museum staff will continue to decolonize practices and policies within the Archives. This includes formalizing written policy that restricts culturally sensitive imagery from general researchers, with exemptions for members and organizations representing the source community. While this has been our unwritten procedure for several years, we recognize the significance in making this practice an official policy. In addition to ongoing, equitable exceptions to our collecting policy, our department has planned visits to Chickaloon and nearby Ahtna communities in the continuation of our digital repatriation project; we are expanding this work with other local tribal governments. Maintaining ideals of decolonization, the Anchorage Museum will continue to develop the archives with equitable practices, aiming for accessibility to a just and accurate historical record.

Jodi Allison-Bunnell, Montana State University

The Archives and Special Collections (ASC) department of the Montana State University Library has significant primary and secondary source materials in its focus areas.[43] With significant recent acquisitions, the department has a strong mandate from library administration to continue to build its distinctive collections.[44]

Like our peer institutions, ASC faces constraints on our capacity for new acquisitions of unique materials—archival, bibliographic, digital, or a mix. Since 2020, we have focused on both increasing capacity and quantifying what our capacity is. We have tackled this problem on several fronts: ensuring that our collections space contains only collections that we can identify; implemented ArchivesSpace with consistent DACS-compliant metadata; greatly changing our collection preparation processes; and using commonly accepted tools to predict collection preparation times and to measure how much time projects take.

To date, we have maximized our available space for analog collections; begun to quantify what space remains; and made measurable improvements in our use of staff time to prepare collections for use by researchers. However, our greatest challenge remains measuring and characterizing capacity for ourselves and our stakeholders. Given the importance of capacity in the framework of responsible stewardship, and

43. Collecting areas include agriculture, architecture and engineering, Montana and western history, Native Americans, Montana State University, politics and government, Montana history, and regional writers.

44. Since 2015, these have included collections from renowned writers Ivan Doig and Tom McGuane, scientist Frank Craighead, writer and filmmaker John Heminway, modern artists Bob and Gennie deWeese, and many collections focused on trout and salmonid.

the dearth of tools to determine it beyond physical capacity, we posit that the profession has some gains to make in providing methods and tools for characterizing capacity.

What's That? The Stacks Mystery Tour

ASC has engaged in some significant reappraisal activities in order to create physical capacity for new collections. Beginning in 2021 and concluding in 2023, we did what has become practically expected for members of my generation of archivists: going through our stacks, shelf by shelf, to identify and create baseline data for all of our collections. This was also part of the process of implementing ArchivesSpace. Our priorities were a description that included a title, scope note, dates, provenance, extent, and shelf location. The purpose of getting an extent measurement was to calculate the total extent of our holdings in relationship to our available space. As expected, this resulted in some delightful discoveries, including a 1920s scrapbook of a dairy promotion campaign, a large collection of Yellowstone postcards, a piece of travertine from the 1869 Cook-Folsom expedition into Yellowstone National Park, and many student scrapbooks that enhance our instruction program.[45]

At the same time, we physically rearranged stacks, acquired as much new shelving as we could possibly fit in the space available to us, and removed numerous items including exhibits, desks, office supplies, and abandoned student projects from the stacks. Campus priorities for new buildings meant that the Records Building, built in 2001 as part of the library building remodel, was being prepared for demolition and the records held therein had to find other spaces. Absent any campus records management mandate (despite the longstanding efforts of our predecessors), in the midst of the pandemic, and with the help of colleagues, we selected the university records to retain that were determined most important to our collecting objectives. This meant that over 700 boxes came into the library and filled our available space, and then some. In the end, we estimate that we have about 6,900 linear feet of collections and 6,600 linear feet of shelf space, plus flat cabinets, cold storage, and some book shelving, leaving us with essentially no collection expansion space.[46]

Where does this leave us? With constrained collections space, certainly. But we can also objectively measure our holdings, know whether we can physically

45. Described further in session "Shame and Hidden Delights: A Discussion of Legacy Metadata and Discovery," part of the 2023 Annual Meeting of Northwest Archivists, accessed April 2024, https://northwestarchivists.org/resources/Documents/NWA%202023%20Annual%20Meeting%20Schedule%2005082023.pdf.

46. These figures are estimates based on best available information of collection extents, and including shelf space that is occupied by materials waiting for assessment, involving many university publications, artifacts, and clippings collections. It also includes an estimate for a large congressional collection that needs further assessment and consolidation to minimize the space it occupies, and about 500 boxes of university records that currently don't have shelf capacity and are stored on pallets.

accommodate a potential collection, and appropriately advocate for increased space as that becomes possible.

Who's Doing the Work? The Lean Redesign

Before 2020, processing was done primarily by the Curator, Head of Special Collections, and occasional temporary faculty, staff, or interns. Workflows developed within each of those positions with little coordination or knowledge of those workflows by the remainder of the department members. Processing techniques, though very solid from a traditional standpoint, were centered on manually producing HTML and EAD finding aids and MARC records. Accession records and locations were managed in an aging ProCite database that was inaccessible to all but the department head and the curator.[47] In general, the department operated very separately from the rest of the organization.

Jodi Allison-Bunnell, the department head, was hired in 2020 to enact significant transformations in the department, including complying with modern national and international standards, improving efficiency, and better integrating with the rest of the library and regional and national collaborations. The department has a staff of 64 faculty and two staff, plus student assistants. Faculty librarians at MSU generally have an assignment of 65% librarianship with the remaining time reserved for service and research, meaning that faculty are available for all aspects of department services for only 26 hours a week. Staff and student FTE is not designated in this manner, but given the multiple foci that the department involves (collection preparation, reference, teaching, outreach, facilities, organizational involvement), no position is wholly dedicated to collection preparation.

Preparation of collections for use in analog or digital form also involves not only ASC, but also Digital Library Initiatives (DLI) and Cataloging, Access, and Technical Services (CATS). CATS provides subject analysis and name authority work for EAD and MARC records, creates metadata for digital collections, and advises on metadata structures for description and management. DLI builds and maintains the library's digital collections, manages in-house and outsourced digitization with ASC, and oversees technical infrastructure for the library that includes the digital collections system. While the working relationships among the three departments were reasonably good, there were few routine processes established for collection processing. Instead, each project was treated as unique, with little clarity about who initiated and oversaw projects, whether digital projects and metadata were part of routine work or were an "extra", and who was empowered to determine or adjust timelines and deadlines. Each time a project transitioned from one department to another, individuals had to schedule meetings in order to discuss next steps. Frequently, projects would stall for weeks or months because they were handed off to the wrong person or because individuals lacked adequate information to do the next

47. ProCite was first released in 1983 and was popular in many industries, including libraries. It has been unsupported since 2013. Additional information available at https://en.wikipedia.org/wiki/ProCite.

step in a project. Project documentation was uneven, requiring repeated decision making and making it difficult to declare successful outcomes because not everyone agreed on end products. Restarting stalled projects took time and fueled frustration between departments and individuals, and library administration often became involved in order to satisfy promises made to stakeholders.

The combination of all of these factors resulted in great difficulty predicting processing times. Without predictability, making promises to donors about the availability of their materials was risky and tended to create unsustainable timelines and overwork—a situation that was not ideal for either staff or donors. For instance, processing and digitizing the initial deposit of the Ivan Doig papers resulted in significant stress and overwork even as it produced an opportunity for library staff to meet a new challenge and exposed the library's premier literary collection in a manner unmatched by most other institutions.[48]

ASC staff, their colleagues in CATS and DLI, and library administration were dissatisfied with the status quo and were ready to find a way to distribute processing among existing positions, promote high-quality standards compliant work, support coordinated teamwork within ASC and across the organization, and enable better awareness of capacity. Through a process conducted in 2020-2021, and with the help of consultants Irene Mauch (The Mauch Group) and Megan Mozina (Cresta Solutions) that employed the Lean framework of Toyota fame, the library vastly increased its documentation, streamlined its workflows, and began both predicting and measuring how long archival, bibliographic, and digital collection preparation took.[49] The effort was strongly supported by the tools in the Responsible Stewardship framework, particularly for calculating potential hours required to complete archival and bibliographic projects.[50]

We now have consistent processes, project planning, process documentation, and consistent use. The Cross-Functional Group (CFG), made up of the department heads for ASC and CATS and the Digital Production Manager, meets weekly to plan and monitor projects and has made great strides in increasing the amount and quality of work completed. CFG monitors a project tracker and uses the tools from the Lean

48. Kenning Arlitsch et. al., "Digitizing the Ivan Doig Archive at Montana State University: A Rise to the Challenge Illustrates Creative Tension," Journal of Library Administration 57, no. 1 (January 2, 2017): 99-113, https://doi.org/10.1080/01930826.2016.1251251.

49. "Center for Faculty Excellence," Montana State University, accessed April 2024, https://www.montana.edu/facultyexcellence/. The Lean Redesign for Archives and Special Collections at Montana State University was facilitated by the partnership between Mauch Group LLC (https://mauchgroup.com) and Cresta Solutions LLC (https://www.crestasolutions.com/) and their principals, Irene Mauch and Megan Mozina.

50. Chela Weber, et. al., "Total Cost of Stewardship." The redesign of the collection preparation processes is detailed in: Jodi, Allison-Bunnell, Anne Jenner, and Emily Dominick, "Leaning Into the Future, Together: Applying Business Process Management to Increase Efficiency and Manage Change in Archives and Special Collections," *College and Research Libraries*, forthcoming July 2024.

process to understand deadlines, assign personnel across departments, predict how long a project will take, and consistently measure progress. As each project starts, CFG reviews the project plan, including time estimates in hours, and asks each department head to identify who has capacity and should be assigned to a project. This process is not by any means scientific and is best characterized as guesswork. Time tracking is in days rather than hours. While some staff and faculty have adapted well to using the project planner, others require reminders and sometimes have to estimate dates now passed. We are using an Excel worksheet rather than a project management program since efforts to use Microsoft Planner were unsuccessful even at the department level. At the end of each project, the CFG does a review, which includes measuring how long a project took to complete in days, comparing against the time estimates in the original project plan, analyzing where project slowdowns occurred, and identifying where changes could create better outcomes in the next project.

All of these new processes have certainly contributed to higher quality work and improved morale. CFG's collective finger on the pulse of projects has made a significant difference in ensuring that projects don't get stuck. And we are better prepared for surprises: a grant project that unexpectedly required us to create four digital collections on a tight timeline was completed successfully and on time—something that, as the Digital Projects Manager said, could never have happened before processes were revised.[51] However, some projects continue to take more time than anticipated without CFG being able to make adjustments to shifting realities.

Can We Do That? Calculating Staff Capacity

Given the variables that shape the actual time required to prepare collections, have we any hope of calculating actual capacity? As part of the revision of ASC's collecting policy, and with firm support from library leadership, CFG has agreed that we will look at that capacity more scientifically and adjust it regularly.

One significant hurdle is time tracking. In some parts of libraries, notably in technical services departments, detailed time tracking is an important and well-established practice.[52] It is likewise ubiquitous in a number of other sectors, including consulting and law, where clients are billed by fractions of hours, and is fundamental to the fields of management and industrial engineering, beginning with the works of Frank and Lillian Gilbreth and Fredrick Winslow Taylor. The tools currently available

51. "From the Mountains to the Prairies, From Trout to Dace: Revealing Climate and Population Impacts on Culture, Ecology, and Economy in Montana's Fisheries" in: "Funded Projects," CLIR, accessed April 2024, https://www.clir.org/hiddencollections/funded-projects/. Resulting digital collections (Lilly, Behnke, Nemes, Proper) available at https://www.lib.montana.edu/archives/trout-salmonid.html.

52. See, for instance: Dilys Morris et. Al., "Where Does the Time Go? The Staff Allocations Project," *Library Administration & Management* 20, no. 4 (Fall 2006): 177; Dana Miller and Teressa Keenan, "The Time Management Study as a Tool for New Technical Services Managers," *Library Leadership and Management* 30, no. 1 (2015): 1-22.

through the Responsible Stewardship toolkit are the result of detailed time tracking at a number of institutions that others can take as inspiration. For us, this will require a substantial culture shift.

Within the archival profession, we are having robust discussions about our culture of overwork.[53] Many professionals, particularly younger ones, are pushing back against that culture in specific and overt ways on an individual level, but taking decisive actions at the institutional level is arguably the most systemic and equitable direction for us all to take. Additionally, having organizations take this action helps ameliorate the need for individuals to act in self-defense through strategies like "quiet quitting."[54] Over the course of my own career, I've struggled to understand my own capacity and to adequately prioritize at some cost to my health and well-being, and I'm really heartened by the discussion we are now having. As a middle manager, I support those discussions and any other efforts to improve the wellbeing of my colleagues and organization. At the MSU library, calculating capacity accurately and ensuring that we don't ask staff to work beyond capacity will almost certainly remain tricky until we move toward more granular time tracking. In the meantime, our current efforts to measure and manage capacity across departments are a beginning point that is consistent with the current direction and needs of the profession.

Toward Responsible Stewardship

The tools for communication and calculating resources needed to prepare collections contained in the Total Cost of Stewardship toolkit are invaluable and groundbreaking, allowing us to begin to determine and articulate our capacity to be responsible stewards of our collections. In that report, an illustration of the total cost is pictured as an iceberg—the cost of the initial acquisition is really just a small portion of the total cost, which lies mainly "below the surface" as the costs for cataloging, storage, preservation, and maintenance. As we begin to exercise greater stewardship for both our collections and the people who work with them, we will need to also make specific characterizations of our capacity in our collecting statements and policies. To carry the "iceberg" metaphor perhaps farther than we should, we will only navigate through the always complex waters of stewardship if we have the maps and robust radio communications. Otherwise, we will continue to run into the icebergs and sink our own ships.

Conclusion

The case studies presented here represent significant shifts in collecting policies over the last 25 years. All of us have been deeply involved in reconsidering and

53. See, for instance: Meredith Farkas, "Less is Not More," *American Libraries* 48, no. 11/12 (Nov/Dec 2017): 48, and the concept of "vocational awe" articulated therein.

54. See, for instance: Alejandro Marquez, "Don't Ignore Quiet Quitting," *American Libraries* 54, no. 6 (Jan 2023): 54, where he states, "Quiet quitting is a direct result of overwork, neglect, and low compensation."

shifting our collecting practices and foci. For all of us and our institutions, we've confronted the "vacuum cleaner" collecting of the past, made difficult decisions to deaccession or refuse materials that do not merit our scarce space and resources, and developed collaborations with other cultural heritage institutions to the benefit of our donors, researchers, and institutions. For Linda, this has been through finding arguably "hidden" collections that the University of Oregon already had and building relationships to represent an important component of contemporary Oregon history, lesbians and separatist communities. For Trevor, this has been through deep engagement with tribal entities in the region to transform Washington State University's practices with indigenous materials. For Chloe, Amy, and their colleagues at the Anchorage Museum, radical transformation of collecting and access policies and focusing wholeheartedly on BIPOC and indigenous communities is a bold example of the new way forward. For Jodi, this means preparing to move forward with a better sense of Montana State University's capacity for responsible stewardship through a holistic understanding of available space and staff capacity. We have all been part of, and continue to contribute to, fundamental shifts in how we and our institutions carry out our missions.

A natural question is what resistance we have encountered along the way from administrative entities, donors, and other stakeholders. Our answer as a whole is that we've encountered very little or none. When we take opportunities to explain our rationale for changes, we have found understanding from most parties.

As the archival profession works to fundamentally change how and what we collect, we need new methodologies for collection development. The changes that have tended to be addressed as their own distinct topics (matching collecting to capacity, collaborative approaches to collections that represent diverse communities, more appropriate handling of Indigenous collections, and changing processing methodologies) need to become instead clear components of our collection development policies and the core literature that supports their development and maintenance.