JSTOR

2024–2025

Bridging Capacity and Care

A Field Report on Archives and Special Collections

Prepared for the JSTOR Digital Stewardship Services program by
Emilie Hardman, Research Lead, Archives & Special Collections
Sr. Curator, Reveal Digital, ITHAKA

Hardman, Emilie. “Bridging Capacity and Care: A Field Report on Archives and Special Collections.” JSTOR, 2025. http://www.jstor.org/stable/resrep70507.

Bridging Capacity and Care

A Field Report on Archives and Special Collections

Emilie Hardman
Research Lead, Archives & Special Collections
Sr. Curator, Reveal Digital, ITHAKA

About the author: Emilie Hardman's career has been centered in special collections and archives with roles at University of Arizona's Center for Creative Photography as Head of Archives and Digital Strategy, Massachusetts Institute of Technology (MIT) as the founding Head of Distinctive Collections, and Head of Teaching, Learning, and Digital Scholarship at Harvard University's Houghton Library. Emilie's academic background is in Sociology with a focus on qualitative methods and sociology of culture.

Executive Summary

This report synthesizes extensive discussions with approximately 280 archival professionals across 24 special collections and archival institutions in the United States and the United Kingdom, capturing their direct experiences and reflections. Rather than presenting prescriptive solutions, the findings highlight the challenges, lived realities, and complex ethical considerations archivists and special collections librarians encounter in their stewardship roles. Key themes articulated by participants include navigating resource limitations, ethical decision-making around *reparative description** and representation, the intellectual and ethical implications of metadata creation, and tensions between preservation and the institutional drive for immediate access and engagement. The narratives portray primary source stewardship as an ongoing negotiation—a delicate balancing act between immediate demands, ethical imperatives, and long-term responsibilities, conducted amid the persistent pressures of constrained resources and shifting user expectations. Ultimately, this report foregrounds the professional commitment archivists bring to sustaining the intellectual integrity, ethical responsiveness, and cultural relevance of their work. Participants highlighted several recurring and interconnected themes.

***Reparative description**
Relating to remediation of practices or data that exclude, silence, harm, or mischaracterize marginalized people in the data created or used by archivists to identify or characterize archival resources.

Resource Constraints and Institutional Impact

Special collections and archives staff described significant challenges posed by persistent shortages in staffing and physical space. Many emphasized the transformative impact these constraints have on professional roles, forcing staff to redirect their expertise toward supervising contingent staff and/or student labor rather than engaging in strategic or scholarly activities. Space constraints further compound these issues, compelling archivists and librarians to make ethically charged decisions about collection priorities, often implicitly determining which narratives and histories will receive institutional attention.

Processing Backlogs and Scholarly Implications

Discussions frequently addressed the paradox presented by substantial backlogs of unprocessed collections. While *More Product, Less Process (MPLP)** approaches offer a short-term path to alleviating immediate backlog pressures, staff members expressed concern over the longer-term consequences of minimal processing. They recognize that unprocessed or minimally processed collections shift interpretative labor to researchers, inevitably influencing the scope and nature of scholarly inquiry. One archivist noted, “What we don’t process shapes scholarship as much as what we do.”

Metadata Labor

Metadata generation is essential for discovery and access, yet how it is approached varies across institutions. While some metadata creation, particularly for complex or historically sensitive collections, requires careful negotiation between standards, best practices, user expectations, technological demands, and ethical considerations, much of it is treated as routine and mechanical. This divide reflects a structural reality that shapes both how metadata is created and how it is valued within their institutions. Particularly in the United States, much of this work is delegated to student workers, interns, and/or entry-level staff members. While this approach is a functional response to financial constraints and serves to increase institutional capacity to process materials, participants expressed concerns about quality control, descriptive consistency, and the implications of shifting foundational descriptive work to those with limited training. Even as repository staff deeply value and champion their student workers and early-career colleagues, they also reflected on the risks of relying on

---

***More Product, Less Process (MPLP)**
Minimal processing to arrange and describe archival series and collections to reduce or avoid backlogs.

temporary or less-experienced labor for work that may benefit from more experience and sustained attention. Reliance on students and entry-level staff further necessitates continuous oversight, training, and remediation, creating tensions between efficiency, accuracy, and professional expertise.

Impact of Digital Fragmentation

Archivists and librarians consistently described digital fragmentation not simply as a technical inconvenience but as a significant professional burden–one that existing tools and services rarely alleviate. Staff members expressed how navigating disparate digital platforms and siloed systems diverts their energies away from core stewardship tasks and toward continual troubleshooting and system maintenance.

Invisible Labor and Digital Competency

Staff consistently highlighted the extensive, often invisible, effort required to develop contemporary and future-looking digital expertise. The prevalence of informal, self-directed learning processes points to significant gaps between applied training and practical demands. This raises questions about the nature of existing professional development opportunities and the sustainability of relying on self-directed expertise.

Critical Perspectives on Technological Democratization

Participants offered nuanced reflections on technologies such as artificial intelligence. Many emphasized the knowledge workers' essential role as an active mediator who ensures these technologies are implemented in ways that genuinely advance inclusivity, equity, and meaningful user engagement. Archivists and librarians tended to criticize techno-solutionism, highlighting the necessity for human judgment in addressing biases, ensuring contextual accuracy, and maintaining ethical standards.

Preservation versus Immediate Institutional Priorities

Archivists and special collections librarians consistently articulated tensions between the foundational nature of preservation activities and the visibility-driven demands of institutional leadership and community demand. Staff observed that institutional reward structures typically privilege immediate, tangible access outcomes over long-term preservation efforts, creating ongoing challenges for sustained institutional attention and investment in digital preservation.

1. Introduction: The Shifting Landscape

KEY TAKEAWAYS

Special collections and archives are facing intense pressures from digital demand, institutional change, and resource constraints.

The profession is navigating a shift from bespoke practices to scalable solutions.

Archives are redefining their relevance through care-based, community-informed approaches.

This report reflects what practitioners are seeing and doing on the ground—not what theory prescribes.

Academically situated special collections and archives have long served as the cornerstones of research, teaching, and cultural preservation within library systems. They steward unique and rare materials, providing access and supporting the research work that shapes and reshapes historical narratives. The knowledge workers in these repositories hold evident care for and belief in the importance of the collections in their care, the services they provide, and the things they make possible. Yet through a time marked by constrained resources, shifting institutional priorities, and the imperative for robust and increasingly dynamic digital access, these repositories navigate seemingly perpetual change, a process that places strain on staff and sometimes provokes unsettling questions around the future. As demands continue to press on these repositories, how can these vital sites keep adapting to meet them?

The observation of this strain and great change is unlikely to be novel for anyone in the field: The challenges within special collections and archival departments are well understood and articulated by staff. Systemic and deeply rooted challenges are apparent daily as staff tackle legacy issues such as unprocessed backlogs or the complex problems of poor

For some years, the archival field has been navigating the shift from bespoke, individualized practices to scalable, systemic solutions informed by field-wide, vetted best practices and standards, all while contending with the on-the-ground realities of fragmented workflows and limited resources.

interoperability in their systems. Staff can speak to the issues of underfunded digital collections programs, fragmented digital preservation infrastructure, and significant under-resourcing in their units making it difficult to meet the demands for classes, events, and community engagement. These pressures are further compounded by the growing integration of special collections workflows into broader library systems, introducing interdependencies that sometimes compromise local autonomy, dilute once highly specialized expertise inputs, and complicate daily operations.

Digital preservation demands and consistently evolving user expectations around digital discovery and virtual engagement with collections are additionally confronting repositories at scale in broader and more complex ways than in the analog era. Staff members are aware that their technological and descriptive frameworks lag behind contemporary user expectations, particularly for large-scale digital research and artificial intelligence–driven analysis. The field's great reliance on More Product, Less Process (MPLP) mitigated analog backlogs, but it also left many collections ill-prepared to meet emerging digital needs. These challenges are not simply local quirks or preparedness problems for the computational era; they reflect systemic patterns that reveal how the intersections of historical workflows, institutional and field cultures, and ever-present resource constraints have shaped many dimensions of archival and special collections work.

For some years, the archival field has been navigating the shift from bespoke, individualized practices to scalable, systemic solutions informed by field-wide, vetted best practices and standards, all while contending with the on-the-ground realities of fragmented workflows and limited resources. Staff frequently speak of the tension between a commitment to providing tailored solutions for unique, high-value collections and the pressing need for scalable practices to address growing backlogs and meet increasing user demands. These ongoing demands perpetuate broken workflows, as there is rarely sufficient time or capacity to pause and address systemic issues. Instead, staff rely on ad hoc strategies and temporary fixes that, while necessary to manage immediate needs, often deepen long-term inefficiencies. This dynamic encapsulates the difficulty of balancing the craft and care central to archival work with the operational scale demanded by modern institutions especially in a context marked by resource scarcity and the strong strain of burnout culture in higher education. Against this backdrop, staff across institutions nevertheless express genuine excitement for new possibilities especially around models of post-custodial collecting that reshape traditional institutional power dynamics. Likewise, the interest in

reparative or inclusive metadata revision highlights an increased interest in community needs and desires concerning the description of the resources stewarded by these repositories. These shifts are, in many ways, efforts to evolve the profession and champion its relevance to a wider swath of users (and critics) in the 21st century. In prioritizing thoughtful and nuanced approaches to community care and accessibility over unchecked growth, archives and special collections are recasting themselves as potential spaces for more inclusive, more collaborative storytelling, willing if not necessarily always ready to meet the next generation's research agendas.

Drawing on site visits with 24 special collections and archives units in the United States and the United Kingdom, alongside interviews, focus groups, and observational sessions with approximately 280 people working in these repositories, this report illuminates the pressures, creativity, and care that define the current landscape of archival work. Its intent is not to prescribe fixes but to document how frontline staff and senior administrators alike respond to the pressing challenges of this moment. This report is grounded in the lived experiences of library staff, and seeks to provide a reflective, nuanced view of those experiences.

Special collections and archives have a rare capacity to bridge the past and present. They are not merely custodians of the past; they are active participants in shaping the future of scholarship.

In listening to the voices and observing the work of these staff members, it is evident that this moment of transformation presents opportunities, and perhaps obligations, to reimagine stewardship in the 21st century. Special collections and archives have a rare capacity to bridge the past and present. They are not merely custodians of the past; they are active participants in shaping the future of scholarship, impacting teaching and learning, inspiring creative production, and fostering meaningful insights for all who engage with their collections, staff, and services. And through all of the challenges, the knowledge workers in these repositories perform labors of love—for the analog collections in their care, for the born digital collections they seek to steward and support in new ways, for the creators of these collections, for their colleagues, and for the people who use the collections to generate creative work, course papers, fascinating new scholarship, and much more.

2. Systemic Challenges in Archives Special Collections

KEY TAKEAWAYS

Resource scarcity—especially staffing and space—forces difficult decisions about collection priorities.

Chronic understaffing and reliance on student and other contingent labor increase training burdens and limits long-term process improvements.

Backlogs (both analog and digital) reflect deeper legacy issues, often symbolizing unresolved institutional values and labor inequities.

Staff increasingly juggle generalist roles due to structural shifts and reduced autonomy within library systems.

Librarians and archivists often describe their work as "eternal," reflecting both an enduring sense of importance for the materials they steward and the never-ending cycles of tasks required to manage them. Additionally, this sense of "the eternal" captures long-standing professional practices and the sometimes reverent adherence to historical roots of archival practice which can collide, of course, with change and new possibilities. With brimming backlogs of analog and born-digital collections and strained staffing models that increasingly rely on contingent labor, these units often operate in environments where the gap between aspiration and capacity may seem to be eternally widening.

Such challenges are heightened by structural changes in academic libraries. Technical services and digital collections departments now centralize workflows that once occurred within special collections and archives units specifically. And many archivists speak to the notable reduction of dedicated staff within their units, leading to new dependencies across their library systems and provoking questions about how to carry out their work. As one

With brimming backlogs of analog and born-digital collections and strained staffing models that increasingly rely on contingent labor, these units often operate in environments where the gap between aspiration and capacity may seem to be eternally widening.

focus group participant remarked, "We know, I think, that we will be good stewards of what we have, but we don't know if we can be good stewards of future material." The "future," however, is in many ways already here, or at least is not at all distant, and to meet the goal of good stewardship, there are ample opportunities for rethinking how special collections and archives define and sustain their work. They are not merely operational issues but signs of a field at a crossroads, where historical practices converge with new expectations and realities. Archivists navigating this space are reshaping not only workflows and strategies but also the very ethos of stewardship.

2.1 Resource Constraints

Resource limitations are a pervasive issue across the field, evident in constrained budgets, shrinking staff, and a critical reliance, at least in United States repositories, on student workers to fill gaps. These constraints are nearly universal across the sites in our study; even well-resourced institutions do not necessarily extend robust support to their libraries, much less directly to their special collections and archives units. Budgetary shortfalls not only limit investments in staffing but may also hinder critical infrastructure investments, such as digital preservation systems and physical space. As one leader observed, "We're being asked to do more with less, and the cracks are starting to show."

Staffing Shortages

Staffing shortages are one of the most visible and immediate manifestations of resource constraints. "Staffing is our biggest gap. We just don't have people. Our bandwidth creep has grown, and we're trying to do more than we can actually do," said a unit leader, speaking to the issue that many repositories are facing. Many institutions are operating with minimal staff and are tasked with overseeing an ever-growing array of responsibilities. The reassignment of headcount to other areas, often to support broader digital collections programs within the library, exacerbates these challenges, leaving special collections and archives teams specifically stretched thin. As one archivist observed, "We've become generalists out of necessity: juggling technical work, public service, and preservation all at once."

Where specialized expertise is required, such as in digital preservation, metadata creation, and audiovisual materials processing, many repositories face challenges in recruitment and retention. Limited salary offerings, relocation costs, high costs of living, and long commutes are frequently cited as obstacles. Several sites reported multiple failed searches for critical

positions, pointing to both budgetary constraints and the challenges of a competitive job market, especially for more seasoned workers. At leadership levels, staff are less expected to be generalists than they are to be general experts in everything from curatorial oversight to paleography, systems management and machine learning. Some institutions have responded by building internal pipelines to address recruitment challenges, investing in the development of local talent through mentorship and training programs. These efforts, while promising and supportive for entry- and mid-level staff, require sustained resources and strategic planning.

Reliance on Student Labor

To fill the gaps, many repositories now rely on student labor for functional operations, providing a cost-effective way to address reading room and research services as well as basic archival processing and digitization work. "There's a tendency from above to say like 'just put a student on it,'" a department lead noted, "but … [students] can't do all of this. Things that are less sexy, those are things they say 'throw a student on it,' but [those areas are] where we need staff focus."

While generally seen as cost-effective, student workers often require substantial training and oversight. And as one participant noted, "By the time they're trained, it's time for them to leave." Some sites have calculated student workforce management impacts on staff time and costs to productivity, concluding that having student workers ends up costing them more than an entry-level staff line. Reliance on student workers can also cost repositories innovation potential. The demands of training and managing the temporary labor force leave little time or capacity for staff to rethink or improve processes. When a 12-student team can barely keep up with basic paging operations function as it is and a supervisor needs to maintain careful oversight of the fragile workflow, it is understandably challenging to implement any meaningful changes.

> "We're not just asking students to process materials. We're teaching them to think critically about archives.
> — Staff member

Some institutions have sought to address this tension by investing in robust training programs that reframe student labor as pedagogical opportunities rather than stopgap operational measures. "We're not just asking students to process materials. We're teaching them to think critically about archives," one staff member observed, emphasizing the dual role of students as both contributors and learners. This orientation reflects the broader mission of these repositories within their academic institutions: to serve as spaces for student development, offering hands-on experiences that enrich their understanding and broaden their academic and professional horizons.

Go beyond the report: Drew University students helped catalog, digitize, and activate archival materials. Learn more →

Space Limitations

Space constraints are among the most enduring and multifaceted challenges faced by special collections and archives, intertwining with issues of stewardship, access, and institutional priorities. These limitations are not merely logistical hurdles; they reflect deeper questions about how repositories allocate resources, balance physical and digital holdings, and align collection practices with large institutional values and priorities.

Distinctly configured physical storage space, climate-controlled, secure, and at least somewhat sensibly arranged for various formats and sizes, has long been understood as a core need for stewardship of unique and rare materials. Yet many repositories are now reaching or exceeding their capacity. While consortial arrangements and off-site storage offer some relief, these solutions tend to be costly and are, at the end of the day, finite in themselves. It is also labor intensive to manage retrievals from off-site storage. Repositories grappling with space constraints frequently face difficult compromises, often resorting to makeshift solutions such as converting office spaces, staff rooms, or even semipublic areas like reading rooms into holding zones for materials. Though framed as temporary measures, these solutions often evolve into long-term practices with no clear path to resolution. As one archivist noted, “Once done it’s almost impossible to undo without a grant or full work-stop.” Reconceiving a storage plan and undertaking significant shifts of material can make it impossible to serve collections to users or meet demands for classes.

> “We’re constantly being asked to justify our square footage.
> — Staff member

The use of non-purpose-built spaces introduces significant risks, including compromised environmental controls, challenges in locating materials, and inefficiencies in managing workflows. When in place, these ad hoc measures solve an immediate problem of “Where can we put this?” but become disruptive to staff operations, further straining already limited resources. Beyond the logistical hurdles, these compromises also reflect broader institutional dynamics. Decisions about space are rarely made in isolation; they are shaped by external pressures and shifting priorities, such as the increasing emphasis on open student study areas within libraries. Repositories are often competing with campus-wide demands for space, leading to tensions over who has the right to occupy prime real estate.

“We’re constantly being asked to justify our square footage,” one staff member said. Special collections and archives also have to justify the costs involved in protecting their celebrated collections from pests, water events, and disasters. The routine costs of integrated pest management and the involved processes of keeping disaster plans evergreen are sometimes neglected or deprioritized as other demands take precedence.

As an answer to physical storage issues, some repositories have explored a “digitize and destroy” approach to reducing their footprint. The method is potentially compelling for some materials, particularly in university archives where the content value is often understood to outweigh the artifactual value. Repository staff, however, generally understand this as a poor solution at scale, however, because of the effort it would take to select and manage a new large programmatic digitization workflow. Further, digital storage introduces its own set of challenges, particularly if it must house critical surrogates or born-digital materials.

Most significantly perhaps, the costs of maintaining scalable and secure digital infrastructures are immense. While the vast majority of repositories in this study do not currently bear the direct costs of digital storage (these are typically absorbed by central IT or rolled into larger library budgets) there is growing concern that they may soon need to account for these expenses, particularly as digital collections continue to grow. As an IT professional embedded in a library system said, “[Storage] is not billed directly to the unit. However, discussions are underway about transitioning to a centralized billing system, potentially moving to a model where costs are incurred monthly.” There are also storage space limits under the current terms of digital storage management. Across sites where this information was available, repositories saw an average of 7 terabytes as absorbable within existing library infrastructure systems, a figure that could easily be surpassed by any programmatic work to digitize or reformat collections.

The myriad costs of space, both physical and digital, and the impacts of managing it force a reckoning with questions of acquisition and retention in special collections and archives. Should repositories continue to collect materials when their existing collections are underfunded and understaffed? What role might community input play in shaping these decisions? How do space constraints intersect with broader goals of equity and inclusion, particularly in the stewardship of underrepresented histories? Space scarcities quickly move repositories into a space of making difficult trade-offs. Do all materials merit retention? What does the math look like when considering the concepts of historical, research, or cultural value against the realities of an already full storage area? These questions are not

abstract; they are a daily reality for staff navigating their roles, as curators who are charged with developing collections and as collections managers charged with responsible oversight of the collections. Furthermore, these questions highlight that space constraints are, at their core, financial constraints. Repositories or their home institutions quietly absorb the ongoing cost of storage, yet securing dedicated funding for it remains a challenge. Just as institutions struggle to make a compelling fundraising case for physical storage, they also face difficulties framing the perpetual expense of digital preservation storage as an urgent or fundable priority.

Space constraints are, at their core, financial constraints.

At a distance, given the potential impacts of such decisions, no one would say that acquisitions for analog or digital materials should take place in isolation. They, rather, ought to be considered in the context of overall operations. And yet, processing, storage, and access workflows are not always considered fully from the beginning of the question, "Should we acquire this?" Sometimes, staff members point out, the question actually needs to be "Can we acquire this?" The answers to those questions might not always be the same, especially when there is almost quite literally nowhere to put incoming acquisitions. Addressing these challenges requires careful recalibration of acquisition priorities to ensure alignment with available space and resources. It also demands intentional collaboration between teams to navigate the complexities of balancing growth with sustainability in collections stewardship.

2.2. Backlogs and Legacy Issues

Backlogs remain one of the most notable and pressing challenges for special collections and archives, poignantly yet humorously symbolized by what one site called their "shelves of woe"—complex or vast unprocessed holdings that hinder access and mission fulfillment. The materials that make up an institution's backlog are often the hardest things to process. These particularly difficult collections or stray materials, particularly those with unclear provenance or documentation, are deferred indefinitely, categorized as "problematic" and set aside for a hypothetical future when more resources will be available to tackle the problems. As one staff member noted, "These collections are the ones we know need the most attention, but they're also the ones that we never seem to get to." These backlogs also include digital materials as well. Drives and discs of woe, as it were. And wherever the materials reside, these backlogs can represent years and sometimes decades of deferred decisions, simply targeted triage, underinvestment, or overcollecting. Their presence is a reminder of the tension between what repositories aspire to achieve and the realities of their resources.

> You look at these shelves, and they're not just materials—they're histories waiting to be told, and we're not able to get to them.
>
> — Archivist interviewee

Site visits revealed considerable variation in how repositories experience and approach backlogs. Some institutions prioritize materials based on immediate user demand, focusing on processing collections that are frequently requested by researchers or faculty. Others adhere to thematic or funding-driven priorities, with grants and donor expectations sometimes dictating which materials receive attention. As one staff member noted, "We process what's urgent, but urgent doesn't always mean important. There's so much left behind." Backlogs are not just a logistical issue but also an emotional burden for many staff, who see unprocessed materials as a mark against their professional and ethical responsibilities. "You look at these shelves, and they're not just materials—they're histories waiting to be told, and we're not able to get to them," one archivist said. This sense of a professional obligation unfulfilled can weigh heavily.

For smaller institutions or those with limited staff, even basic backlog management can feel insurmountable. With limited resources, decisions about what to process often boil down to what is achievable in the moment rather than what aligns with long-term goals or broader user needs. This mismatch can create significant gaps in discoverability, leaving researchers unaware of potentially valuable materials. "The backlog isn't just hidden from the public; it's hidden from us," one archivist observed. Staff can't point users toward resources they don't even know about, making it impossible then for user demand to lead the way on processing priorities.

On the ground, backlogs seem to generally be accepted as a fact of life and a bane of archival existence. However, efforts to streamline processing with a specific intention to reduce backlogs have also introduced tensions. The adoption of MPLP principles, widely regarded as an "industry standard" processing method, has enabled many repositories to at least nominally reduce their backlogs by emphasizing baseline descriptions over detailed approaches. Yet, as discussed in section 3, MPLP has accumulated its own debt. For some staff, the emphasis on high-level description feels at odds with their commitment to achieving deep and meaningful understanding of their own collections. "MPLP gets things out the door, but it feels like we're just kicking the can down the road," one archivist noted.

Backlogs force staff to confront difficult questions about capacity and institutional values. Staff spoke candidly about the compromises they are forced to make. "Every decision about what to [bring out of the backlog] is a decision about what to leave behind," one archivist said. Other staff consider questions like, "What does it mean to prioritize certain collections over others? How do repositories ensure that their backlogs don't inadvertently

perpetuate inequities by sidelining underrepresented voices or histories?"

The space to consider such questions is rare, but some repositories have taken the backlog and legacy collections as sites of possibility, where they can reflect on their values and reimagine practices. Several repositories have begun to shift their curators away from acquisition and toward the reappraisal of both processed collections and backlog materials. This shift represents a deliberate effort to make more strategic decisions about what materials should continue to receive institutional resources. Reappraisal offers an opportunity to revisit legacy collections, ensuring they are relevant to contemporary institutional priorities and community needs. "It can be like shopping at home," joked a curator, as materials with little or no description are rediscovered by staff and given new attention. Staff at some sites described this work as liberating, providing clarity about the scope and purpose of their holdings. "We're not just adding materials; we're trying to understand what we already have and what it means for the future," one unit leader said.

Materials awaiting processing for Distinctive Collections

3. Metadata Practices as a Foundation for Digital Futures

KEY TAKEAWAYS

MPLP trade-offs have accumulated: minimal description hinders digitization, computational research, and user discovery.

Born-digital materials pose deep challenges due to format complexity, limited expertise, and fragile technical metadata.

Audiovisual and rare book materials suffer from underdescribed "aboutness," isolating them from current scholarly and access frameworks.

Reparative description is ethically imperative but labor-intensive, requiring thoughtful, context-aware revision of legacy metadata.

The exponential growth of special collections and archival materials including manuscripts and ephemera, printed texts and artifacts, audiovisual, and born-digital materials has forced a fundamental rethinking of processing and descriptive practices over the course of the 20th and early 21st centuries. Institutions continue to grapple with difficult decisions about how to prioritize and describe materials. "Metadata creation is our major bottleneck," one digital collections staff member explained, while another noted that "the detailed, nuanced metadata about our collections that is required for advanced research continues to challenge us." Library and archive staff work to balance the imperative to make materials visible against the effort and time it takes to produce meaningful, ethically grounded metadata. Add to those imperatives the increasing call for *computationally useful metadata** and the challenges are even more acute.

***Computationally useful metadata**
Computationally useful metadata is structured, standardized, and semantically rich descriptive information that enables automated processing, discovery, analysis, and reuse by machines without requiring significant human intervention.

This section examines how these shifting priorities and constraints are redefining the central role that metadata plays—not only in facilitating access, but also in sustaining long-term scholarly value and community engagement.

3.1 The Role of MPLP

Library and archive staff work to balance the imperative to make materials visible against the effort and time it takes to produce meaningful, ethically grounded metadata.

In response to the speed and volume with which collections have grown and the near universal specter of the backlog, the contemporary state of archival processing has been shaped by calls for greater efficiency in processing and describing materials. Greene and Meissner's 2005 concept, "More Product, Less Process" (MPLP), introduced a new approach that emphasizes pragmatic, baseline description over the cultivation of granular detail. *Its broad adoption across the field* represented a pivotal shift in archival processing, marking a move away from exhaustive item-level description toward more efficient methodologies. Twenty years later, as some processing archivists joked, staff now reach as a matter of course for that "Golden Minimum" in order to make collections available for research more expeditiously. As one archivist observed, "MPLP has saved us from drowning under unprocessed collections."

Archivists experience unprocessed collections in the backlog as a unique blend of philosophical, moral, and reputational concern. It's a philosophical problem in the sense that archivists and librarians, as custodians of cultural memory, carry obligations to make materials accessible; moral in that backlogs prevent communities from accessing collections; and reputational in that the very presence of these materials, functionally hidden and inaccessible, undermines institutional standing because the large backlogs may be interpreted as evidence of inefficiency or mismanagement. MPLP and similar approaches offered what felt like a necessary reprieve from the overwhelm.

At its root, archival theory is predicated on principles of arrangement and description that emphasize understanding collections at high levels, rather than engaging in exhaustive item-level work. Descriptive practices like series-level processing were designed to balance intellectual control with practical resource limits. The emphasis on presenting collections at this macro level reflects the canonical archivist's role in preserving contextual integrity of records and ensuring their usability for researchers, who are then to interpret specific items within this broader framework. On the face of it, MPLP seems just to reaffirm these longstanding ideals by emphasizing high-level arrangement and description to reduce backlogs. Yet Greene and

Meissner's intervention did more than restate existing theory: It directly challenged tendencies toward increasingly detailed intellectual and physical processing in the face of mounting backlogs. In practical terms, while MPLP advocated for iterative processing, where collections could be revisited and enhanced as specific needs arose, it also became a broader philosophical statement, emphasizing efficiency over exhaustive description and fundamentally reshaping how archivists approached processing decisions.

Archivists experience unprocessed collections in the backlog as a unique blend of philosophical, moral, and reputational concern.

However, site visits suggest that MPLP's benefits have come at a cost—a kind of accumulated *descriptive debt** that requires repayment in the increasingly digital, data-driven era. A vast majority of the repositories in the site visits reported struggling with minimal descriptions that, while initially expedient, now impede digitization, where item-level description is generally required. At one repository, staff on the digital collections team noted that "our box-level descriptions never captured what now seem like essential metadata points." Further, said an archival processor, "we don't even have the base level of metadata in many cases to be able to digitize something because we wouldn't know what it is and how can we expect users to know in that case?" As sites wrestle with what metadata exists, what is needed, and how it should be formed, another repository questioned whether MPLP truly saved time: "Do we spend more time deciphering and wrangling older descriptions than we saved?" This is certainly not helpful for users either, who not only can't efficiently achieve their discovery goals within digital environments but also face significant barriers to exploring relationships between materials because they are unable to connect themes and threads that cross collections.

Challenges of the Digital Landscape

On the ground, it seems evident that the efficiencies MPLP achieved have come with trade-offs. The question of how these archival norms will meet evolving user needs remains both active and unresolved. Streamlined descriptive practices, while practical in addressing backlogs, have frequently left collections ill-prepared for a digital and computational environment, proving unresponsive to contemporary user expectations. Minimal metadata, inconsistent levels of detail across collections, and uneven descriptive standards create gaps that inhibit discoverability.

***Descriptive debt**
Descriptive debt refers to the cumulative cost—intellectual, technical, and labor—that must be paid to make minimally processed or under-described archival materials discoverable, accessible, and usable in digital environments. It arises when minimal description processes sufficient for physical stewardship fall short of what is required for computational access, searchability, and contemporary user support at scale.

Moreover, users seeking out these materials are, as many staff members across repositories observed, differently trained on the contemporary technologies that are prevalent in our lives and are often unprepared for discovery work within current archival description frameworks. For many library and archives staff, it seems as though the gap between institutional capabilities and user expectations continues to widen and metadata is, underneath all of the tools and systems, perhaps the biggest wedge. Shaped by search experiences on everyday platforms, users now bring assumptions rooted in seamless, intuitive interfaces and workflows and in robust metadata systems optimized for products or personalized content. As one library leader commented, "The tools we provide are decades behind what users expect. We're constantly trying to close that gap, but the pace of demand outstrips the pace of change."

For many library and archives staff, it seems as though the gap between institutional capabilities and user expectations continues to widen and metadata is, underneath all of the tools and systems, perhaps the biggest wedge.

Although librarians and archivists have long recognized that the technology at their disposal has lagged behind widely adopted commercial tools, the challenges extend beyond hardware or software; they also indict the very metadata practices historically considered a core strength of the profession. Metadata creation, once a point of pride, is now inconsistently deprioritized and underresourced. Archival processing units have experienced significant staff reductions, with teams at Ivy League, R1, and Russell Group institutions often limited to just one or two people on staff.

Contemporary discovery depends heavily on granular, interoperable metadata for both access and machine-driven insights. Yet even as these needs go unmet, a near-future shift looms: one where metadata's centrality may be diminished as computational tools extract meaning directly from full documents, bypassing older descriptive layers. But because of the lack of metadata today, many repositories are not digitizing their content at scale. Consequently, significant content will remain inaccessible to the machine processing that will define the next wave of discovery and scholarship. As one digital archivist observed, "Even when our collections have been digitized, they're not computationally ready. The gap between digital access and computational utilization is enormous."

3.2 Challenges Across Formats

While the main focus of this section has so far been on archival and manuscript description, metadata challenges manifest differently across various formats. Sites in our study were generous in walking through their processes for many format-specific processes for born-digital materials,

audiovisual (AV) collections, and rare books and manuscripts, each of which require specialized approaches to metadata creation and management.

Metadata Challenges for Born-Digital Materials

Metadata creation, once a point of pride, is now inconsistently deprioritized and underresourced.

Born-digital materials ranging from emails and digital photographs to multimedia files and complex datasets represent the realities of new cultural production and often pose a challenge for special collections and archives. In about half of the sites visited, if any other format was available for acquisition, it would be selected over born-digital content. Avoidance is the strategy, but no one is under the illusion that this can be a reasonable long-term approach.

When born-digital materials arrive in collections, they often carry a trove of embedded *technical metadata**, the byproduct of digital file creation and storage processes. This includes timestamps, file paths, software dependencies, version histories, and cryptic fields generated by content management systems. Despite the richness of this metadata, much of it remains untapped unless units have specifically reorganized to support more digital collections processing and preservation workstreams. The dense, inconsistent, and often proprietary nature of technical metadata can create significant barriers for archivists, whose traditional tools and workflows have been shaped by work with analog collections. As one archivist succinctly put it, “We are trying to manage terabytes of data with workflows designed for paper archives.”Although technical metadata can provide critical insights, such as identifying files created in obsolete software or flagging dependencies no longer supported, transforming these insights into actionable preservation and access strategies requires specialized tools and expertise that many repositories lack. Further, technical metadata alone falls far short of offering the descriptive richness necessary for discovery and use. Knowing the date and file type of a Word document, for example, offers no insight into its contents or significance. One institution acknowledged that even when robust technical metadata fields were populated, staff struggled to layer in the descriptive information researchers need to navigate the labyrinth of complex born-digital collections. This gap underscores the dual challenge faced by repositories: not only must they develop the capacity to harness technical metadata, they must also bridge it with human-centered descriptive practices to make these materials meaningful and accessible to users.

> “We are trying to manage terabytes of data with workflows designed for paper archives.
> — Archivist interviewee

*Technical metadata
Descriptive data about the technical characteristics of digital files and systems that supports their management, access, and long-term preservation.

Archivists describe frustration with the disconnect between the potential of metadata and its practical utility. “We’re not just processing collections anymore; we’re untangling ecosystems of information,” said one archivist. These ecosystems are sprawling, with nested file formats, undocumented dependencies, and metadata fields that often require technical expertise to interpret correctly. Without a clear understanding of what metadata fields are genuinely useful for discovery, description, and preservation, repositories risk being overwhelmed by data that offers little actionable value.

Compounding these issues is the sheer fragility of born-digital materials. Digital files degrade silently, through bit rot* and file format obsolescence, making the extraction of robust metadata not just a convenience but a necessity. Without clear documentation of dependencies, file histories, and technical specifications, future archivists may find themselves strangers to their own collections, unable to reconstruct the environments necessary to render these files intelligible. As one curator described, “Some of this kind of work feels like trying to preserve a book but losing the language it was written in. No matter how carefully we protect the files, we lose their meaning if we can’t interpret them through the environment that once gave them life.”

And yet, even when these materials are technically accessible, they often remain unintelligible to end users. The archival field hasn’t fully addressed the needs of users navigating these born-digital ecosystems. Researchers accustomed to intuitive interfaces, predictive search, and seamless discovery experiences encounter born-digital archives with opaque file structures, inconsistent metadata, and few navigational cues. This is the heart of the issue: Even when born-digital collections are available, they are not usable. As one archivist remarked, “We may have opened the doors, but we didn’t build the pathways for users to find their way.” The challenge of born-digital metadata isn’t simply its existence or preservation but its ability to function as a bridge between technical stewardship and understanding. Resolving this disconnect will require more than technical fixes. Those working with these born-digital materials point to needs for deeper alignment of metadata practices with user needs, a better understanding of which metadata fields matter most for access and preservation, and an ability to prioritize descriptive work alongside technical capture.

> “No matter how carefully we protect the files, we lose their meaning if we can’t interpret them through the environment that once gave them life.
> — Curator interviewee

***Bit rot**
The gradual corruption or degradation of digital files over time, rendering them unreadable. Bit rot can result from magnetic decay, file format obsolescence, or hardware failure, and is a key threat addressed in digital preservation.

Rare Books and Bound Manuscripts: Balancing Artifact and Data

> “Each of these items has a story to tell, not just in its text but in its materiality.
> — Curator interviewee

Rare books have long been emblematic of special collections, valued as both significant physical artifacts and textual resources. Their physicality, the bindings, marginalia, paper stock, watermarks, and traces of ownership, anchors them as unique objects, rich with contextual clues about their creation, dissemination, and use. These materials have served as touchstones for traditional humanities scholarship, offering insights into book history, cultural transmission, and intellectual networks. Yet, in an era increasingly shaped by digital tools and computational research methodologies, their relevance as objects is often overshadowed by the accessibility of digitized resources. Rare books, which can require in-person interaction to fully engage with their materiality and unique features, can be perceived as peripheral to broader research agendas. “If I don’t make extra effort to bring them into the classroom, they just aren’t going to be used at all,” said one special collections librarian educator. The growing lack of engagement with these parts of collections raises questions about how rare books are framed within institutional priorities and how their unique qualities can continue to enrich contemporary scholarship.

During site visits, librarians, archivists, and curators spoke with passion about the tactile and visual insights rare books and bound manuscripts offer. “Each of these items has a story to tell, not just in its text but in its materiality,” one curator reflected. The emphasis on materiality has been a part of metadata practices that do indeed describe physical attributes: bindings, colophons, provenance details, and ownership marks. These descriptive practices support traditional scholarly inquiries into book history and physical bibliography, yet they often leave significant gaps when it comes to enabling computational or digital research. As one librarian observed, “We can tell you who owned it, what it looks like, but we can’t tell you what’s in it.” Indeed “aboutness” is rarely accounted for in practice. Many of these resources also lack subject headings, form/genre, and MARC* 520s which would offer narrative descriptions of the works. These descriptive gaps limit the discoverability and usability of these materials in both analog and digital environments.

Descriptive gaps limit the discoverability and usability of these materials in both analog and digital environments.

***MAchine Readable Cataloging (MARC)**
A data communications format that specifies a data structure for bibliographic description, authority, classification, community information, and holdings data. MARC field 520 contains information that describes the scope and general contents of the cataloged materials.

Historical expectations about who a user was and what body of knowledge they would bring to their research are not now, if they ever were, accurate, and many users may not have strong insights into what these works are about. Without subject headings or narrative descriptions, materials may be essentially invisible to many researchers, especially those who are not working in the specialized domain of book history. This issue is exacerbated in digital environments; without adequate metadata to express an artifact's contextual significance or aboutness, researchers may struggle to locate or interpret materials, limiting the scope of their inquiries and work within the collections. As one archivist said, "We know the demand is there, but we're still figuring out how to meet it."

While digitization has expanded access to rare and distinctive books, the fragmented relationship between digital surrogates and descriptive metadata undermines scholars' ability to meaningfully explore the very uniqueness that makes these materials valuable.

Rare and distinctive books were among the earliest candidates for digitization because they presented fewer practical challenges: typically out of copyright, standardized in physical form, and as a bonus, often visually appealing. Yet despite the inherent nature of books as multiples, individual volumes frequently contain differences such as marginalia, provenance details, printing anomalies, or binding variations that hold crucial significance for scholars. Digitization initiatives often either digitized just one representative copy or relied on surrogate images created by other institutions, under the assumption that a single digital instance could sufficiently represent all copies. Compounding this issue, descriptive metadata* is frequently created separately from digitization efforts and stored in systems not directly integrated with digital repositories. As a result, unique copy-specific details that researchers rely on, such as annotations, ownership records, or printing variants, are rarely captured in searchable metadata fields, making targeted discovery or analysis challenging.

For scholars specializing in book history, bibliography, or material culture, the separation of digital images from robust copy-specific description severely restricts interpretative and analytical possibilities. Computational methodologies, such as text mining, network analysis, or geospatial mapping, also struggle under these conditions, as they require well-structured and detailed metadata to be effective. Consequently, while digitization has expanded access to rare and distinctive books, the fragmented relationship between digital surrogates and descriptive metadata undermines scholars' ability to meaningfully explore the very uniqueness that makes these materials valuable.

***Descriptive metadata**
Information that explains the content, context, and characteristics of an item to support its discovery, identification, and understanding.

These tensions are not evenly distributed across institutions, nor are they simply a matter of repository size or resources. Larger repositories with funding streams dedicated to rare books may be able to invest in more robust metadata creation and experiments with computational tools for automated subject extraction or AI-driven metadata enrichment. These resources could enable them to explore new approaches to metadata that enhance the usability of these materials for both traditional and computational research. However, even at these institutions, investment in descriptive metadata for rare books often lags behind unique archival or manuscript holdings, as rare books may be perceived to hold less singular value due to their multiplicity across collections, and given the reduction in metadata resourcing broadly. One librarian described the reality well: “We’re still cataloging the basics. Anything beyond that feels like a luxury.”

There are also broader questions about whether traditional metadata practices can fully bridge the gap between rare books as physical artifacts and the datasets computational researchers require. Some librarians expressed skepticism about the limits of metadata in addressing these needs. “Metadata can only do so much,” one curator noted, “especially when we’re dealing with objects that weren’t created to exist in digital form.”

Despite these challenges, rare books and bound manuscripts remain sites of immense scholarly promise. Archivists and librarians navigate multiple competing imperatives: balancing fragility against accessibility, viewing rare books as artifacts or as data sources, and managing preservation alongside usability. These tensions are not merely technical but reflect shifting perspectives about the role rare books can and should play in contemporary scholarship. As one librarian advocated, “We need to stop seeing these books as static objects in a catalog and start imagining what they could reveal if we let them.”

Audiovisual Materials: Preservation and Access at a Crossroads

Audiovisual (AV) materials are among the most vulnerable formats in archival collections. From fragile analog media like magnetic tapes and film reels to born-digital audio and video files, these materials present unique challenges that can test the limits of institutional resources and expertise. As repositories navigate the dual imperatives of preservation and access, the role of metadata becomes increasingly central, but also increasingly complicated.

During site visits, archivists frequently emphasized the precarious state of AV materials in their collections. “We’re racing against time,” one AV specialist explained. “The materials are deteriorating faster than we can process them.” Even the few sites with dedicated AV reformatting programs expressed concerns about the potential loss of content on fragile carriers, such as reel-to-reel tapes and VHS cassettes, which face both physical degradation and obsolescence. While digitization can stabilize and preserve content, its effectiveness depends on robust technical metadata to ensure long-term usability. For digital AV materials, technical metadata must capture details like codecs, bit rates, resolution, and file formats, which are critical for playback and future migration as technologies evolve.

The challenges of metadata creation for AV materials are both technical and conceptual. Descriptive metadata must provide content details such as subjects, creators, and contexts that support discovery, while technical metadata must ensure the files can be accessed and understood in the future. However, scalable tools and workflows for AV metadata creation remain limited, forcing many institutions to rely on time-intensive manual processes. A majority of sites reported that even when basic metadata extraction tools were available, manual review and refinement were necessary to ensure accuracy. “We can’t afford to do this one tape at a time,” one specialist lamented, “but we do.”

As repositories navigate the dual imperatives of preservation and access, the role of metadata becomes increasingly central, but also increasingly complicated.

Another major obstacle is the siloing of AV metadata within repositories. Many institutions lack systems that can integrate technical metadata with descriptive and administrative metadata, leaving AV materials isolated from the broader archival infrastructure. This disconnection hampers discoverability and limits the ability of researchers to engage with AV collections. “Our AV materials live in a kind of metadata limbo,” one archivist observed. “They’re not integrated into our main catalog, so researchers don’t even know they exist.” The user experience further highlights the importance of robust metadata for AV materials. Researchers and students increasingly expect seamless, intuitive access to digital collections, yet AV materials are often poorly described or locked behind restrictive playback systems or entirely separate platforms. One librarian shared their frustration: “We’re digitizing AV, but without the right metadata, people can’t find it—or worse, they don’t even know to look.” Resource disparities across institutions exacerbate these challenges.

Repositories that have specialized AV staff and dedicated digitization labs are, of course, better equipped to handle the technical demands of AV metadata creation and preservation. Other institutions see their options as restricted to vendor services to deal with AV collections and that is a

Researchers and students increasingly expect seamless, intuitive access to digital collections, yet AV materials are often poorly described or locked behind restrictive playback systems or entirely separate platforms.

significant budgeting issue and project management challenge. One archivist from a mid-sized repository described their uphill battle: “We have hundreds of tapes, no playback equipment, and no one on staff who knows what to do with them.” A limited number of vendors provide trusted reformatting services for repositories, and some do include metadata. Even in those cases, preservation still rests on the repository. Some focus on access via YouTube and Vimeo; others use a system like Aviary which offers more fine-grained controls, but still must be integrated with a disparate preservation system.

Despite these challenges, promising strategies are emerging. Some repositories are using automated tools like MediaInfo and ExifTool to extract technical metadata from digital AV files, providing foundational data for preservation workflows. Others are collaborating with groups like Northeast Document Conservation Center (NEDCC), and the Audio-Visual Preservation Exchange (APEX) to share resources and expertise, particularly for high-cost initiatives like format migration and large-scale digitization projects. Additionally, there is a growing recognition of the need for robust field-wide standards to address the unique requirements of AV metadata, encompassing technical attributes, descriptive elements, and rights and permissions. These efforts, while still in development, represent important steps toward scalable and sustainable AV preservation practices.

3.3 Reparative Description

Reparative description has been a focus in the field in recent years and emerged as a central practice during site visits, reflecting an on-the-ground commitment to addressing historical biases and fostering equity. This approach acknowledges that traditional descriptive practices often marginalized or erased certain voices, perpetuating systemic inequities in how histories are documented and understood. By revising and contextualizing archival records, repositories seek to not only amend the archival record but also build trust, foster healing, and empower communities to reclaim their narratives. Despite the pressures of backlogs, resource constraints, and competing priorities, repositories across the board are investing in reparative description as a fundamental obligation to their communities. “Even knowing we have tons of other work waiting, we have to do this work, it’s nonoptional,” said one unit leader. This work is driven by ethical imperatives, reputational considerations, and the growing visibility of archival records in the digital age, which has intensified scrutiny of harmful or exclusionary practices.

> “Even knowing we have tons of other work waiting, we have to do this work, it’s nonoptional.
> — Unit Leader

Ethical Imperatives and Community Obligations

By revising harmful descriptions, repositories are addressing historical wrongs and signaling their willingness to evolve and build new connections with the community.

Reparative description is, at its core, a practice of accountability and care. Staff across the board noted that this commitment is not merely theoretical but deeply practical. By revising harmful descriptions, repositories are addressing historical wrongs and signaling their willingness to evolve and build new connections with the community. As one archivist explained, "We're not just fixing records. We're building relationships. Reparative description tells our communities that we see them, we value them, and we're willing to do the work to get it right." For many, the digital environment has also heightened the urgency of reparative description. As archival records become more widely accessible online, the flaws and biases embedded in legacy descriptions are subject to greater public scrutiny. This heightened visibility makes reparative description a reputational imperative as well as an ethical responsibility, particularly as users and broader communities increasingly demand accountability for exclusionary practices and harmful language.

Some fixes are easier than others. Nearly every repository visited, for example, either uses Homosaurus or is considering it for future implementation. Homosaurus functions as an LGBTQ+-specific controlled vocabulary, designed to supplement or replace traditional subject headings that often fail to represent LGBTQ+ identities and experiences accurately. Its adoption reflects a growing recognition that traditional controlled vocabularies often fail to adequately or respectfully describe marginalized identities and experiences. And because it integrates into contemporary cataloging systems like Alma and can be applied retrospectively to records, allowing institutions to make immediate improvements to description practices, it is a lighter lift than other metadata interventions. In contrast, revising legacy archival records requires intensive manual review and remediation, often across thousands of inconsistently structured entries, making it a far more labor-intensive and resource-draining process. While archivists expressed optimism about tools like Homosaurus, they also acknowledged the weight of the work ahead and the gaps that are left, as Homosaurus surely isn't the only vocabulary that could provide value.

Retrospective projects to revise and remediate legacy metadata often require sustained institutional support, technical infrastructure, and a green light to expend labor on intensive review processes. In archival management systems like ArchivesSpace, reparative description also often involves deeper contextualization of records, particularly within finding aids. This work requires a granular approach, revisiting series- and item-level descriptions where they exist to identify and amend exclusionary language or

misrepresentations. Archivists highlighted the labor-intensive nature of this work, noting that it often demands collaboration across teams and, in some cases, with external communities. “Reparative description in ArchivesSpace isn’t just about fixing language,” one archivist explained. “It’s about creating context, acknowledging harm, and ensuring that our records tell fuller, more honest stories.”

> “Our job isn’t to erase history, but it’s also not to leave harm unexamined. We have to hold both of those responsibilities at once.
> — Archivist interviewee

During site visits, archivists shared stories that underscored the nuanced and sometimes fraught decisions they face in reparative description work. One repository grappled with a collection assembled by a prominent historical figure who was a Holocaust denier, raising questions about how to describe materials faithfully while confronting the harm inherent in the creator’s language. In another example, a popular digital repository item bore a title that included a racist slur, forcing difficult conversations about whether and how to preserve its original terminology. At yet another repository, the papers of a family involved in the buying and selling of enslaved people posed similar challenges: How can these histories be described in ways that acknowledge their full impact without perpetuating harm? As one archivist reflected, “Our job isn’t to erase history, but it’s also not to leave harm unexamined. We have to hold both of those responsibilities at once.”

This tension illustrates a broader challenge: reparative description is not simply about removing offensive language or correcting past oversights, it’s about proceeding with care, transparency, and intellectual integrity. Overwriting the historical record risks flattening its complexity, yet leaving outdated or harmful descriptions uncontextualized risks perpetuating harm. These decisions can’t be treated as routine. As one leader put it, “The digital space makes our descriptions a public statement. If we’re not thoughtful about how we describe, we’re complicit in perpetuating harm, but thoughtfulness doesn’t always mean making the same choice in every instance.” This observation points to the evolving understanding that reparative description is not a standardized fix, but a series of informed decisions made in specific contexts.

The digital infrastructure of archival systems further complicates this work. Metadata records are often siloed on individual platforms, duplicated in fragmented systems, or reliant on outdated technical standards that limit opportunities for revision. Archivists must navigate not only descriptive choices but also technical limitations, all while balancing competing demands on their time and expertise. As one archivist said, “Every time we update a term or address a harmful description, we uncover more layers that need attention. It feels endless, but it’s necessary.” These questions: how to balance historical integrity with present accountability, how to scale

reparative initiatives without exhausting already-limited resources, and how to embed this work into the fabric of archival practice rather than treating it as a one-off project are shaping the future of archival description.

> “You can’t just take these stories and lock them away. You have to listen, you have to respect what people want done with them.
> — Archivist interviewee

Reparative description, in practice, often extends beyond metadata revision into an exercise of emotional and ethical responsibilities. Across institutions, staff describe the challenge of preserving records linked to trauma, loss, and erasure while fostering trust and accountability with the communities connected to those histories. As one archivist reflected, “You can’t just take these stories and lock them away. You have to listen, you have to respect what people want done with them.” This reflection underscores the emotional labor inherent in archival work, where archivists and special collections librarians become not only caretakers of memory but also, at times, repositories of grief. Their responsibilities require continuous negotiation of ethical dilemmas surrounding access, privacy, and representation, issues that are perhaps increasingly complex to manage in digital environments.

Go beyond the report: One archivist sees potential in AI to uncover hidden connections, support reparative description, and expand access—without compromising care. Read more →

Processing deferred: Shelves of Woe

4. The Digital Imperative: Challenges and Transformations

KEY TAKEAWAYS

Fragmented digital systems and one-off projects strain staff, reduce discoverability, and undermine long-term planning.

Staff often operate without aligned infrastructure, relying on ad hoc solutions, self-teaching, and non-integrated workflows.

Virtual reading rooms and AI tools offer promise but require investment, risk management, and equitable design considerations.

Preservation infrastructure remains undervalued; successes are invisible, while failures are catastrophic—driving misaligned institutional priorities.

Archives and special collections are, as of course we all are, navigating this increasingly digital world. For these repositories though, the work of their overall stewardship mission has grown exponentially more complex within this digital environment and its rapid technological transformations. Physical workflows, honed over decades through standardized practices and shared frameworks or best practices, can offer a foundation of stability, but their digital counterparts demand adaptation unique to their institutional settings and a pace of change that often outstrips institutional capacity. And the flow of digital materials keeps increasing. One digital archivist observed, “This is going to be for everyone the real problem. It’s all being created at a scale that we aren’t set up for.” Extrapolating from what is being brought in now, several repositories guess that they will see something like double the amount of born digital content in just the next five years. The persistent analog challenges of resource scarcity, backlogs, and infrastructure gaps now intersect with the technical, ethical, and logistical realities of digital formats and at scale. Born-digital materials, audiovisual collections, and large-scale

digitization projects promise to reimagine access and preservation but simultaneously expose a widening gap.

> “Every system is great at one thing, terrible at everything else, and none of them talk to each other.”
> — Participant

During site visits and discussions with staff across institutions, it became clear that while there is broad consensus around the goals of digital stewardship* (expanding access, enhancing discoverability, and ensuring long-term preservation), the capacity to achieve these goals varies dramatically. Infrastructure, technical expertise, and funding shape not only what is possible but also how priorities are set. The ambition to make collections discoverable across diverse platforms frequently collides with uneven metadata practices, siloed systems, and outdated infrastructure. This collision creates frustration for staff tasked with navigating these technological tangles, often relying on ad hoc solutions to stitch together disparate systems. As one participant remarked, “Every system is great at one thing, terrible at everything else, and none of them talk to each other.” This fractured digital environment is not just a technical challenge; it reflects deep-rooted structural and cultural issues within institutions, where digital infrastructure is often built reactively, through temporary funding streams, or tied to high-visibility one-off projects rather than integrated into long-term strategic planning.

> “We need systems that talk to each other, funding that doesn’t disappear after one project, and a commitment to building scaffolding, not just showpieces.”
> — Archivist interviewee

Moreover, while significant energy and attention have been devoted to high-profile digital projects, particularly those with grant funding, faculty champions, or external visibility, the full and foundational infrastructure that supports sustainable stewardship can remain neglected. Some institutions have built, as one team put it, “digital lighting shows” that dazzle while leaving the fuse box upgrades unfinished, as it were. These dynamics create a cycle of temporary successes, where individual projects may shine brightly, but systemic weaknesses remain unaddressed, limiting long-term progress. Equally important, staff across institutions recognize that digital infrastructure is not simply about acquiring better tools or increasing server space; it’s about creating cohesive workflows, aligning institutional priorities, and fostering cultures that support collaboration across historically siloed areas of expertise. As one archivist summarized, “We need systems that talk to each other, funding that doesn’t disappear after one project, and a commitment to building scaffolding, not just showpieces.”

***Digital Stewardship**
The active, ongoing management of digital materials to ensure their long-term preservation, access, authenticity, and usability. It includes practices like storage monitoring, metadata creation, and format migration.

4.1 Infrastructure and Fragmentation

A recurring theme across institutions is the persistence of fragmented digital infrastructure environments. During interviews, staff described workflows that are stitched together from multiple unconnected systems, each designed to manage a single type of resource or deliver a narrow function. One interviewee remarked, “We’ve worked hard to make ad hoc solutions work, but every fix feels like a patch on something fundamentally broken.” This lack of integration not only complicates workflows for staff but also reveals itself in the user experience.

Staff spent considerable time troubleshooting these inconsistencies, manually fixing broken errors, and responding to user confusion.

At one institution, staff described significant challenges in managing access to digital materials across multiple platforms. The library used separate systems for linking digitized books, providing access to digitized archival materials, and serving digital exhibitions, AV materials, and special projects with their own websites. While the catalog pointed to digital objects, the access platform for AV required separate logins and displayed different metadata fields. Researchers also frequently encountered broken links or incomplete records when moving between these platforms, resulting in repeated requests for staff assistance. Staff spent considerable time troubleshooting these inconsistencies, manually fixing broken errors, and responding to user confusion. In another example, an institution with a robust digitization program struggled with integrating their digital exhibit platform and institutional repository. The digital exhibit platform offered rich, multimedia storytelling tools but lacked integration with the institutional repository, where the digitized objects were officially stored and described. Staff had to manually transfer digital objects and associated metadata from one system to another. Further, changes made to metadata in the repository did not automatically reflect in the exhibit platform, leading over time to inconsistencies between the two interfaces.

In many places, these challenges arise from the need to address immediate project demands, such as launching a digital exhibit or responding to a donor-funded initiative, rather than designing or retrofitting cohesive technical architectures. Staff members noted that the burden of troubleshooting access issues, manually synchronizing metadata, and maintaining multiple login credentials leaves less time for forward-looking projects. The result is an environment that seems to perpetually strain the people who keep it all working.

Interoperability Issues

Interoperability challenges are a recurring pain point in fragmented digital environments. Many systems lack the ability to communicate effectively with one another, requiring staff to duplicate efforts, reconcile metadata inconsistencies, and manage workflows across disconnected platforms. As one staff member explained, “Our systems don’t talk to each other, and that creates inefficiencies across the board.” These issues translate into significant time spent manually reconciling records, fixing broken links, and patching workflows that could otherwise have been automated. The result is not only inefficiency on the back end but also visible disruptions for end users navigating digital collections.

For users, interoperability failures can mean navigating multiple systems with no clear paths to related materials. As another interviewee noted, “When researchers misunderstand the finding aid in Alma, they think there’s only one box, but it’s actually twenty. That disconnect frustrates everyone.” These gaps are not simply a matter of technical misalignment but reflect broader resource challenges, as institutions lack the staffing and tools to address them at scale. Staff underscored that without shared standards and systems capable of “shaking hands,” as one participant put it, institutions remain locked in silos, unable to achieve the kind of seamless discovery researchers now expect.

> “We don’t need more systems; we need systems that work together, so users stop feeling like they’re being sent from one black box to another.
> — Staff member

Ultimately, interoperability is about more than just making systems compatible; it is about creating an infrastructure that aligns with institutional priorities, reduces redundancy, and supports meaningful access for users. As one staff member summed up, “We don’t need more systems; we need systems that work together, so users stop feeling like they’re being sent from one black box to another.” Interoperability also affects how institutions collaborate and share resources at scale. Without systems designed to integrate data effectively, opportunities for innovation, such as joint platforms for consortial discovery or federated access to large, distributed collections, are constrained. Staff frequently cited the absence of shared frameworks or well-implemented APIs and interoperability standards (e.g., IIIF, OAI-PMH) as a key hurdle, noting that true interoperability demands more than technology alone. It requires the alignment of standards, policies, and institutional practices to ensure that data can move seamlessly across platforms and contribute to larger-scale initiatives.

Special Babies

Special baby projects, often grant-funded, donor-driven, or faculty-led, can stand as both remarkable achievements and cautionary tales within archives and special collections. They are frequently characterized by their high visibility, clear deliverables, and external appeal, yet their impacts on institutional infrastructure are rarely accounted for in sustainable ways. The special baby project is not always optional for repositories; it is often mandated in one way or another by people who, as one leader said, “do not understand what it means to get this stuff online and looking pretty.” Special projects do, or can, bring value as well as strife: prestige, visibility, valuable digital outputs. However, without strategic integration into broader institutional goals, these projects also may ultimately increase fragmentation, technical debt, and exhaustion in their wake. Special baby projects often introduce bespoke platforms, tools, or metadata practices tailored to the project’s specific goals. About one such project, an archivist said, “we simply hit the wall when we try to do anything with this stuff outside the bounds of its original frame.”

4.2 Digital Capacity Gaps: Expertise, Training, and Sustainability

The conversation around digital stewardship training in archives and special collections reveals significant gaps and not just in availability but in alignment with real-world needs. Staff frequently described training as overly theoretical and disconnected from the actual workflows they are tasked with managing. For example, certifications and professional development opportunities are often tailored to high-level concepts rather than the day-to-day realities of managing terabytes of born-digital files or reconciling inconsistent metadata across systems. One archivist noted that training programs tend to assume a well-resourced environment with a full team of specialists, rather than addressing the reality that many staff members are generalists juggling multiple roles.

Another key theme is the reliance on self-directed learning. Many staff members described teaching themselves new systems, tools, and processes in their spare time or through trial and error. This self-reliance does not necessarily stem from the absence of structured, institutional support for professional development, which is broadly prized and actively supported in these repositories. However, when staff are sent to training programs, there’s little infrastructure to support ongoing application of that knowledge once

they return. As one staff member observed, “It’s like sending someone to learn how to build a house, but then giving them a random hammer and a box of nails when they get back."

Many digital archivist positions are now functionally hybrid roles, requiring expertise in technical tasks (such as file format migration, digital preservation software management, or metadata normalization) alongside traditional archival functions like appraisal and description.

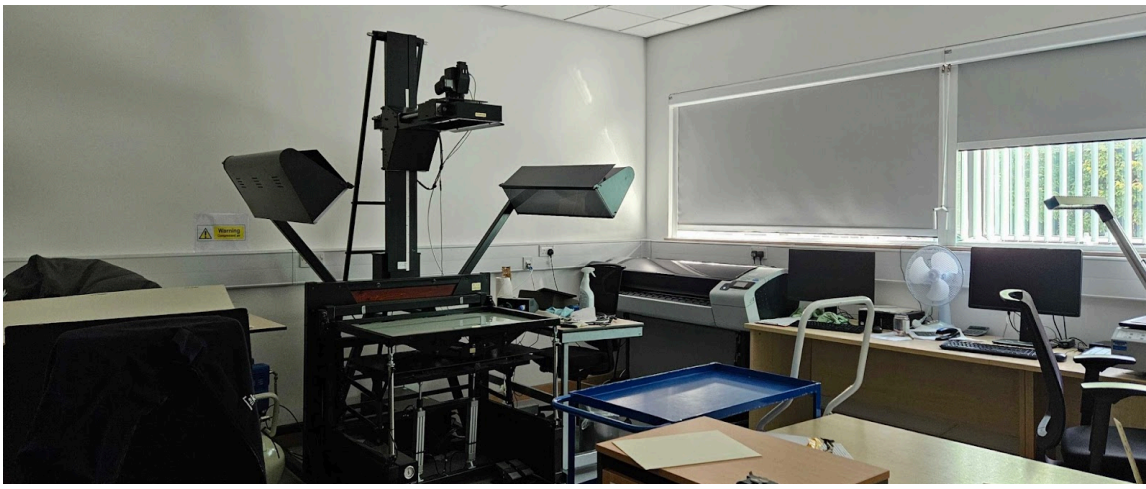
Staff frequently highlighted a misalignment between emerging archival roles and the professional training available to support them. Many digital archivist positions are now functionally hybrid roles, requiring expertise in technical tasks (such as file format migration, digital preservation software management, or metadata normalization) alongside traditional archival functions like appraisal and description. Yet professional development often continues to approach these areas as separate domains rather than integrated workflows, leaving archivists underprepared for the realities of their roles. This disconnect is especially pronounced in smaller institutions, where staff are frequently in generalist-by-necessity roles but also tasked with highly specialized technical responsibilities without dedicated training or sustained support. Larger institutions, while often better positioned to provide specialized training, face different but related challenges: Technical expertise often resides with specific individuals rather than becoming institutionally embedded. When these individuals depart or priorities shift, the institution struggles to retain critical knowledge and sustain technological capabilities over time.

A less tangible but equally pressing issue is the anxiety staff can experience when navigating unfamiliar digital workflows. Some staff members reported feeling unprepared to manage digital preservation tasks involving proprietary file formats, large datasets, or complex metadata structures. This unease stems not simply from the pace of technological change but from gaps in institutional support and training. One leader highlighted a common misconception: “There’s an assumption that younger staff are ‘digital natives’ and will intuitively know how to manage these tools, but that’s not true. Digital work requires specific training, and confidence comes from feeling supported, not from assumptions about generational tech skills.” This disconnect reveals the need for institutions to provide not only technical instruction but also structured, ongoing support to help staff members adapt to evolving challenges.

The solution extends beyond offering more workshops or one-off sessions. Training, as one leader argued, should be reimagined to account for the scale and complexity of digital preservation work, integrating practical skills with broader strategies for problem-solving and decision-making. As one archivist observed, “We’re always trying to catch up, but catching up isn’t a strategy. We need training and support that keeps pace with the scale and complexity of the work we’re being asked to do.” Building confidence in digital workflows

requires a more sustained and systematic approach, one that acknowledges the diverse skill levels of staff and aligns training with real-world institutional priorities and constraints.

> **Go beyond the report: Johns Hopkins University developed flexible workflows to manage everything from ancient manuscripts to 20th-century visual culture materials.** See how →



Special Collections/Archives Imaging Lab set up

4.3 Technology, Equity, and Access

Technology and Equity

> “
>
> We’ve always known transcriptions were important for access, but now it’s clear they’re becoming nonnegotiable.
>
> — Participant

In the context of this study, technology and the digital turn appear to be most significant in how they help or hurt the understood imperative to create equitable and inclusive access to their holdings. Staff across repositories expressed a desire to expand discoverability for underserved communities, sometimes through multilingual metadata or use of community-centered terminology. Additionally, staff members want to improve access for users with different abilities and expressed near-universal concern about the ways in which they sometimes fall short. These fears are grounded in more than a desire to be good citizens; repositories in the United States are also considering the risks of being out of compliance with recent changes to the Americans with Disabilities Act (ADA).

Recent updates to the Americans with Disabilities Act (ADA) specify that web content and mobile applications must be as accessible as physical spaces, a requirement with direct bearing on how archives and special collections provide digital access to their materials. One archivist described how transcription, captioning, and alt text requirements for handwritten manuscripts, AV materials, and images are not only ethical issues but now also potential legal necessities under ADA compliance frameworks. "We've always known transcriptions were important for access, but now it's clear they're becoming nonnegotiable," they explained. In response to prominent lawsuits addressing accessibility for AV, many institutions already required all units making AV content available to provide captioning, but manuscript materials and images (especially outside of digital exhibitions) were not previously considered high-level risks. For most repositories, the work involved in providing equitable access to all these materials is overwhelming.

The general tendency has been to use transcription tools, both automated and crowdsourced, to address the need for accessible texts. Several repositories have experimented with AI-driven transcription services to process handwritten manuscripts and generate captions for audiovisual materials. While these tools offer the promise of scaling transcription efforts, staff frequently noted their limitations. One archivist described AI transcription as a "helpful starting point but never the end of the process," emphasizing the significant manual review required to correct errors and align outputs with requirements for accuracy.

Crowdsourcing transcription is also still used as a solution, particularly in projects with high public interest. Institutions have successfully leveraged volunteer labor to transcribe historical letters, diaries, and other text-heavy collections. In one case, a repository built a near decade-long transcription project involving volunteers, mostly sourced from interested members of the community external to campus. Staff described this effort as a "community-driven process," enabling a deeper connection between volunteers and the archival materials they worked on. Other repositories have used subscription-based transcription services or pilot programs that integrate transcription into their standard workflows. As one archivist noted, "we're trying everything—AI, volunteers, vendors—but we're still far from a perfect solution." Though perfection is evoked here, it is not for lack of understanding it as the enemy of the good. The concerns are less those of rigid idealism than of meeting a different baseline tolerance for high standards of accuracy and credibility embedded within the social practice of the profession. Even small inaccuracies can distort the historical record or damage search and discovery.

Staff highlighted how AI technologies are beginning to assist in these tasks though, offering new possibilities for scaling transcription efforts for handwritten letters, oral histories, and recorded events.

Staff highlighted how AI technologies are beginning to assist in these tasks though, offering new possibilities for scaling transcription efforts for handwritten letters, oral histories, and recorded events. There are still questions about the return on investment, however, with one archivist noting that "AI transcription is exciting, but it's still messy. We spend as much time correcting errors as we would doing the work manually." AI and machine learning tools are also increasingly deployed to address gaps in metadata creation and enhance the discoverability of archival materials. Staff also discussed the promise of these tools for generating subject terms, identifying patterns in collections, and enabling natural language search capabilities. These applications could make collections more accessible to inexpert users and improve equity by reducing barriers to discovery. "Why can't we perform as well as Google?" one staff member asked, reflecting a widespread desire to make discovery more intuitive and user-friendly. Repositories are increasingly grappling with the challenge of designing systems that serve all users. Novice users, often students or community members, might require intuitive tools that meet them where they are in terms of their search and discovery processes. Conversely, expert researchers seek granular metadata and advanced search functionalities. "We need systems that meet users where they are," a public services librarian observed. "The goal is to make archives accessible without oversimplifying their richness."

> "We need to be cautious. AI is a tool, not a solution, and it can't replace the contextual expertise that our staff bring to these collections."
> — Unit leader

However, there is also significant skepticism about the limitations and biases inherent in technology even as it offers some ways through these challenges. Staff pointed to instances where AI-generated metadata reinforced existing inequities, particularly in descriptive language for marginalized communities. "We're trying to do more with less, but we end up harming ourselves with these tools sometimes," a staff member explained, emphasizing the need for human oversight and culturally informed metadata practices. Concerns also extended to AI's potential to misinterpret or oversimplify complex archival materials. As one unit leader warned, "We need to be cautious. AI is a tool, not a solution, and it can't replace the contextual expertise that our staff bring to these collections." Librarians and archivists also worry about the long-term sustainability of investing in platforms or tools that may quickly become obsolete.

Digital Access: Virtual Reading Rooms and Beyond

Every repository working with born-digital materials underscored the promise of anytime, anywhere access as a defining advantage of digital collections, whether born digital or digitized. There has been a kind of intrinsic optimism

about digital: Files can theoretically be accessed by any researcher with an internet connection, unrestricted by geography, time zones, or travel costs. Yet, as conversations across institutions made clear, this promise remains broadly unfulfilled, particularly for sensitive or rights-restricted materials, which form the bulk of many born-digital collections. The results are frustrating. Repositories are often unable to make digital collections easily available and sometimes have to enact restrictive access protocols that mirror or even exceed the barriers associated with physical collections. At site after site, staff self-consciously grappled with their script when researchers ask to use these materials: "Yes, you may access these digital records, as long as you travel across the country and sit at a locked-down terminal in our Reading Room." The situation frustrates everyone.

Repositories also lack the tools that would support robust virtual reading room systems.

Repositories consistently pointed to two challenges for providing unmediated digital content: the labor-intensive nature of preparing files and the technical challenges of navigating and presenting large-scale digital collections securely and sensibly. Broadly speaking, repositories also lack the tools that would support robust virtual reading room* systems. While staff are aware of or have experimented with existing tools like DataVerse or pilots of customized DSpace or Islandora instances, virtual reading rooms would require things that are not typically readily available. Examples include compliance with specified security measures and specialized software that would allow users to navigate a 1990s email inbox or architectural files. Making these materials available online is not straightforward.

Workflows for digital access are dominated by manual interventions, including item-level rights reviews and data redaction. Unlike physical collections, where sensitive materials can often be isolated or restricted at the folder level, born-digital files frequently contain an entangled mix of sensitive and nonsensitive content. As one digital archivist said, “You can’t just flip through a folder and pull out a single page. A single hard drive might contain emails, drafts of letters, deleted files, and a stray video of someone’s family vacation. Every file needs review, and every file feels like a risk.”

***Virtual Reading Room**
A secure, digital environment that mimics a physical reading room, allowing authenticated users to access sensitive or restricted digital archival materials remotely, often with restrictions on download, copying, or printing.

At one institution, staff described the painstaking, months-long process of preparing a single hard drive from an incoming digital collection. “By the time we cleared everything, the researcher who had requested the materials had already moved on to a different project.” If these materials can only be made available under unique circumstances and for individual requests, it’s not

necessarily worth the time and effort for repositories to make them available; yet not doing so feels distinctly against mission.

Without the safeguards of a controlled virtual reading room, processes are particularly slow and careful, driven by staff anxiety about personally identifiable information slipping through unnoticed. Even with robust tools such as Brunnhilde, bulk_extractor, FTK, ExifTool for embedded file information, custom scripts, and AI review, some sensitive content almost inevitably slips by more automated reviews. Such slippage is untenable for stewards of these collections because it can violate donor agreements, damage community trust, or lead to legal issues. Personally identifiable information, such as medical records, academic histories, or sensitive community data, heightens the stakes considerably. In the United Kingdom, compliance with GDPR is a particular concern, while in the United States, institutions face obligations under FERPA, HIPAA, and state-level regulations such as CCPA and CPRA.

> “How they will be built, funded, and sustained in ways that address the needs we have?
> — Archivist interviewee

Beyond PII, ambiguous and/or complex copyright presents another barrier, particularly for AV materials. Staff frequently pointed out that AV materials are high priorities for reformatting and digital preservation because the materials are often on unreliable or at-risk carriers. They are also often in high demand from researchers, but access without secure virtual reading room tooling feels impossible due to rights and permissions issues. The default institutional response is caution, with many repositories opting to restrict access until explicit permissions are obtained, often a slow or unresolvable process.

Virtual reading rooms are seen as a promising bridge between the potential of expanded digital access and the constraints of institutional risk management. Across site visits, staff working with large born-digital collections emphasized the pressing need for systems capable of managing controlled access, enabling scalable authentication, and extending the reach of their collections. As a digital archivist noted, the question is not necessarily whether these platforms will become a standard feature of digital stewardship going forward, “but rather how they will be built, funded, and sustained in ways that address the needs we have.”

> “We are trying to manage terabytes of data with workflows designed for paper archives.
> — Archivist interviewee

In the meantime, repositories are experimenting with other creative means of making select digital collections available. Some repositories are experimenting with innovative methods to make digital collections more engaging and accessible, incorporating technology to create immersive experiences for users navigating collections. For instance, one site used 3D renderings to recreate physical spaces tied to their collecting areas, allowing

users to explore these spaces virtually. This approach was particularly impactful in their work with materials from a theater department, where imaging the physical setting of performances added context and depth to the archival experience. Other repositories have used AR/VR and AI to create opportunities for users to interact with the content of their oral histories. Staff emphasized that these approaches not only enhance the accessibility of collections for remote users but also provide new interpretive possibilities. As one archivist noted, "It's about meeting users where they are and showing them that archives are more than just static objects—they're dynamic, lived histories." These creative uses of technology highlight how repositories are pushing beyond traditional boundaries to make collections more discoverable and meaningful for a diverse range of users.

> **Go beyond the report: Middlebury College is connecting its archives to scholars around the world.** Learn more →

4.4 Digital Preservation

The present moment in digital preservation for special collections and archives is marked by a curious mix of urgency and hesitancy. A growing body of digital content demands swift protective measures, yet local practices often lag behind well-intentioned policy aspirations. Some repositories invest heavily in technical frameworks that promise longevity, only to discover that day-to-day workflows are more reactive, fragmented, or misaligned than expected. Still others dodge the issue wherever they can. One archivist described their repository's current plan as "put anything digital in an acid-free box." Importantly, digital preservation challenges in these repositories transcend a big school/small school dichotomy. The fundamental divide in experiences around these initiatives is one of prioritization and resourcing. Well-funded universities may dedicate insufficient resources to digital preservation, while smaller institutions with focused priorities might develop robust preservation programs through strategic hires and allocations.

> "It's about meeting users where they are and showing them that archives are more than just static objects—they're dynamic, lived histories.
> — Archivist interviewee

At its core, preservation relies on infrastructure that ensures the stability, integrity, and longevity of digital materials. Yet sustaining institutional enthusiasm and investment in digital preservation programs remain challenging, primarily because preservation's successes are largely invisible and its value is often recognized only in moments of failure or crisis. As one digital archivist described, "When preservation works well, nobody notices.

> When preservation works well, nobody notices. When it fails, it's catastrophic. But how do you get people to care about the thing that's only visible when it breaks?
> — Archivist interviewee

When it fails, it's catastrophic. But how do you get people to care about the thing that's only visible when it breaks?" Consequently, preservation activities often fall behind access-oriented initiatives, which promise immediate visibility, demonstrable impact, and direct user engagement. A digital collections leader succinctly noted, "Preservation is passive and subject to hierarchical downgrading. Access needs in the moment almost always trump future concerns." This dynamic explains the recurring theme that emerges across institutions: Preservation qua preservation rarely generates momentum on its own merits. Instead, institutions are driven toward digital stewardship primarily by the tangible promise of increased access, visibility, and user engagement. Recognizing this, digital archivists increasingly frame preservation activities explicitly in terms of institutional impact and risk management, attempting to make preservation's stakes visible and meaningful to institutional decision-makers. As one digital archivist reflected, clearly articulating these risks ensures that "they can understand what's at stake," thus fostering a deeper institutional commitment to preservation's long-term goals.

Even as digital preservation takes its place as a recognized domain of professional practice, the field continues to wrestle with defining its own boundaries. Across institutions, staff balance multiple priorities: For some, digital preservation is a deeply complex negotiation of ethical, cultural, and practical considerations; for others, it's a series of immediate technical tasks. These approaches are not mutually exclusive but illustrate the inherent tension between urgent, task-based work and the broader, strategic goals that give preservation its purpose. This tension is also exacerbated by routine kinds of challenges as acquisitions frequently arrive without meaningful appraisal, leaving staff to triage materials under tight deadlines, often with limited guidance on the long-term significance of materials. Siloed systems, meanwhile, make preserved files difficult to locate or integrate into broader discovery platforms, reducing their usability even though the materials are technically "preserved." These dynamics underscore a critical reality: Digital preservation at its best is not, as one archivist noted, just an endpoint, but rather an iterative, collaborative and actively managed process. Success requires alignment between curatorial vision, institutional priorities, and technological capacity, all while accounting for the evolving nature of both digital materials and user needs.

Go beyond the report: Explore strategies for intentional, sustainable digital preservation: Guidance for Special Collections Preservation.
Learn more →

Collection Management and Preservation

Digital preservation at its best is not, as one archivist noted, just an endpoint, but rather an iterative, collaborative and actively managed process.

A central theme emerging from site visits is a disconnect between digital preservation strategies and broader collection management principles. Many repositories report that significant volumes of material, both physical and born digital, are left unprocessed or minimally managed, awaiting appraisal and description sometimes indefinitely. Digital materials often arrive in bulk, either transferred en masse from external sources or acquired without rigorous curation. This approach compels repositories to adopt reactive preservation measures, expending substantial effort on content of uncertain or minimal relevance. One archivist remarks, "We have drives and discs in boxes. [These] materials that have been sitting for years without anyone understanding what they are or why they were collected." One archivist expressed the frustration of this predicament: "You look at these drives, and they're not just drives—they're histories waiting to be told, and we can't get to them." A few repositories have held strong against this slippage into some of the "bad old days" collecting without articulated cause, stating, for example, "We say anything that goes into the preservation system must be something a curator has deemed of enduring value. That agreement is essential to ensuring our efforts are sustainable."

The absence of a clear curatorial lens at acquisition in some collecting units compounds preservation hurdles downstream. Digital archivists and preservation staff do not regard nonselective or arbitrary collecting and de facto digital preservation activities as beneficial. Many curators have deep subject expertise and may have a solid grasp of appraisal for physical materials, but they may not have built experience and facility with the intricacies of digital workflows. As a result, they can feel uncertain about how to appropriately appraise born-digital or hybrid collections, especially when dealing with obscure file formats, partial metadata, or sprawling sets of emails and social media content. Without any appraisal at the point of acquisition, however, materials arrive at the repository without sufficient contextual or descriptive data, and responsibility for trying to differentiate essential records from "digital detritus" falls on preservation staff. As a staff member noted, "We used to think, 'We'll collect everything and then just weed everything out.' Now we want the donor to curate materials from the beginning." Actively including the creator or donor in curation has helped some repositories; others lean on their digital archivists and bring them to the field to assess digital materials on site.

Digital Preservation as an Isolated Function

Digital preservation workflows still can feel fragmented and lamentably removed from appraisal, description, and access processes.

Many repositories noted that even as some of these roles shift and curatorial comes more into the process, digital preservation workflows still can feel fragmented and lamentably removed from appraisal, description, and access processes. These disconnects are often born of structural necessity and complications around where digital preservation should sit within broader organizational configuration. At the same time, they exacerbate inefficiencies and contribute to a sense of disconnection between the technical and curatorial aspects of stewardship. Underlying these operational concerns is a deeper set of questions about how preservation reflects institutional priorities and values. These competing pressures sometimes result in reactive decision-making, with one archivist observing, "We're preserving everything and nothing at the same time; it's like we're afraid to make choices." The research also illuminated a broader recognition that digital preservation is not a self-contained discipline but one deeply embedded within a larger institutional and cultural framework. One archivist reflected, "Preservation only works if it's connected to everything else—description, access, appraisal. It's all part of the same story." Yet aligning these functions remains a challenge, particularly in institutions where legacy systems and limited resources constrain efforts to build cohesive workflows.

> "Preservation only works if it's connected to everything else—description, access, appraisal. It's all part of the same story.
> — Archivist interviewee

Rather than offering a singular narrative, digital preservation appears as a site where various archival tensions converge: the urgency of access versus the invisibility of preservation, the technical versus the curatorial, and the local versus the systemic. These dynamics underscore not only the iterative nature of preservation but also its role as a barometer of institutional alignment and priorities. Preservation efforts are not merely about solving technical problems but about ensuring that preservation serves as a bridge between past and future, creating systems that can sustain cultural memory in an ever-changing landscape. A curator summed this up well, "We're not just preserving files; we're preserving relationships, stories, and memory," underscoring the inherently collaborative and cultural dimensions of this work.

Tools and Workflows in Digital Preservation

The digital preservation landscape across special collections and archives is a complex landscape of commercial platforms, open-source applications, consortial partnerships, and bespoke homegrown tools, each shaped by unique institutional contexts that include financial resources, technical expertise, culture, and capacity. This variability results in diverse preservation practices and problems, even among peer institutions working from a

common pool of standards and best practices. Some institutions might dedicate significant resources and implement commercial systems while struggling with interoperability and sustained institutional buy-in while others leverage an array of open-source solutions or consortial supports to achieve meaningful outcomes, often while relying heavily on staff ingenuity or external consultative expertise. While no single scenario dominates, familiar issues perplex teams: integration challenges, reliance on hybrid workflows, and single points of failure in staff expertise.

While no single scenario dominates, familiar issues perplex teams: integration challenges, reliance on hybrid workflows, and single points of failure in staff expertise.

Many institutions using commercial or vendor-hosted platforms consistently face frustrations arising from limited interoperability, which requires significant ongoing technical interventions and manual oversight to bridge workflow gaps. As one archivist described, "We have to rely on APIs for basic tasks, and it feels like we're constantly working around limitations. It's like there's a gatekeeper between us and the materials we've worked so hard to preserve." Another digital collections staff member echoed this sentiment, emphasizing the mismatch between preservation aspirations and everyday reality: "We spend more time troubleshooting or manually moving metadata than actually managing preservation workflows. The promise is there, but the reality requires constant patching."

By contrast, open-source and community-drive tools are widely valued for their transparency, adaptability, community, and articulated principles. As in most cases when exploring software solutions, the library and archives community tends to exhibit a preference for open source. Preservation staff also appreciate the transparency of such tools, in particular the visibility of preservation actions and detailed logging, which offers granular insights into each step of the preservation process. As one digital archivist said of their open-source system, "it is incredibly powerful, and it's transparent in a way that's almost comforting. You can see every step, every action logged. Nothing is hidden in a black box."

Yet open-source solutions are not without their challenges. Scalability remains a persistent concern, especially for institutions managing high volumes of incoming digital materials. While these platforms excel at processing smaller batches of files, large-scale ingest workflows often encounter performance bottlenecks.

> "If our expert leaves, the entire workflow could unravel. There's just no redundancy in how we manage these processes."
> — Archivist interviewee

In several repositories, staff have developed wholly homegrown digital preservation tools and scripts tailored to local needs. These systems are often built incrementally, relying on networked drives, cloud storage, and custom scripts for validation, metadata extraction, and file transfers. At one institution, staff described their early preservation approach as "duct tape

and chewing gum. It worked, but it wasn't scalable." They eventually transitioned to a commercial platform, but their homegrown workflows still inform daily practices. Another repository relies on a locally built suite of Python scripts for tasks like metadata validation, bulk file transfers, and checksum generation. The benefits of homegrown systems, of course, lie in their flexibility and responsiveness to specific institutional needs. However, they often depend heavily on a small number of technically skilled staff members. As one archivist put it, "If our expert leaves, the entire workflow could unravel. There's just no redundancy in how we manage these processes." Another staff member reflected on the challenges of maintaining locally developed systems: "We'll test out a bunch of tools, see if they solve our problems, and then lump them together into something functional. It works until it doesn't."

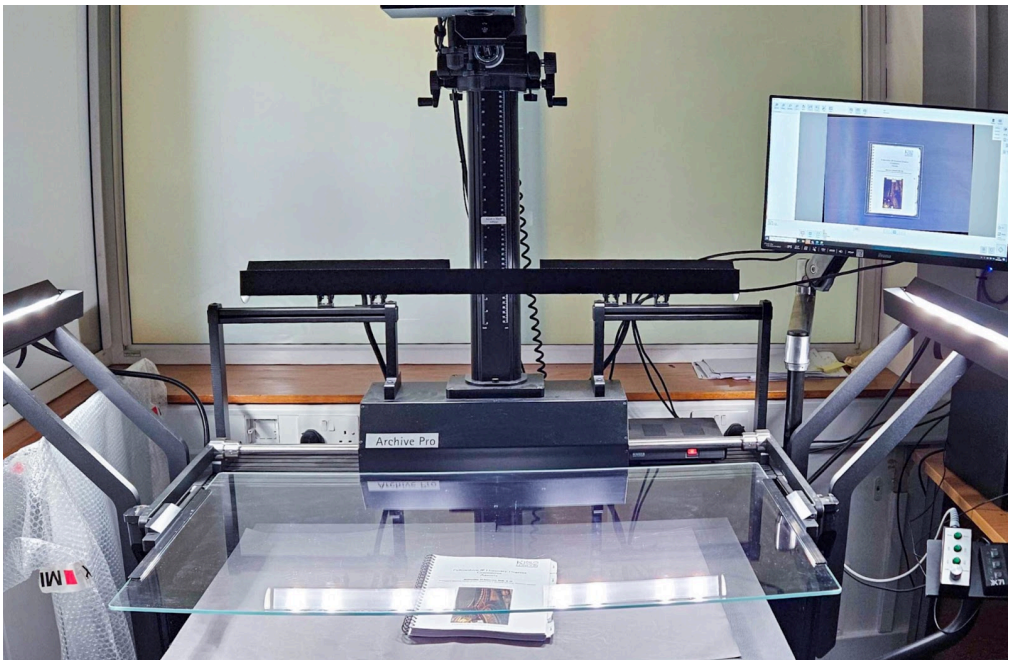
Even institutions using commercial tools frequently supplement their workflows with scripts and lightweight tools to fill functionality gaps. Python scripts are often deployed for file transfers, metadata validation, and automation of repetitive tasks. One repository uses BitCurator and EXIF Tool for technical metadata extraction, followed by Python scripts to standardize metadata across disparate systems. Another employs Rsync for secure file transfers and TerraCopy for bulk validation before materials enter the main preservation platform. A digital preservation staff member explained, "We know some of this is fragile. If a dependency changes upstream or downstream, we could be back to troubleshooting. But for now, they keep us moving forward." While hybrid workflows bridge critical gaps, they require ongoing technical oversight and institutional commitment to maintain institutional knowledge.

Some institutions have additionally opted for consortial models to supplement their digital preservation infrastructure and contribute to the community of practice. Platforms like AP Trust offer redundancy, geographic diversity, and shared expertise. Staff at one repository described the value of consortial participation, "Knowing our files are mirrored across different regions makes me sleep better at night. It's a safety net we wouldn't have on our own." However, reliance on consortial tools also introduces constraints. Institutions report limited flexibility in customizing workflows and frustration with the negotiation processes inherent to shared governance. One participant noted, "We're locked into workflows that make sense at the consortium level, but they don't always align with how we need to work locally." Another leader expressed concern about long-term sustainability: "Consortial models are only as strong as the commitment of their members. If key players step away, the infrastructure starts to wobble."

> "Knowing our files are mirrored across different regions makes me sleep better at night. It's a safety net we wouldn't have on our own.
> — Staff interviewee

MetaArchive Cooperative's recent announcement to sunset their LOCKSS-based program has shown some repositories how it feels when this wobble begins. Founded in 2004 as one of the earliest distributed digital preservation networks, MetaArchive provided a collaborative space for institutions to share both infrastructure and expertise. However, sustaining this model over the long term proved challenging. Structural limitations including financial pressures, shifting institutional priorities, and the administrative burdens of shared governance ultimately outpaced the cooperative's capacity to adapt. As MetaArchive winds down its operations, member institutions are now navigating transitions to alternative preservation solutions, whether by joining other Private LOCKSS Networks or pursuing new local or hybrid strategies. The closure has raised questions for some staff about how long-term sustainability can be built into shared preservation infrastructures without relying on perpetual external funding or a handful of anchor institutions. As one participant reflected on the challenges of collaborative preservation, "These models work until they don't. And when they don't, you realize just how thin the scaffolding was all along."

> **Go beyond the report: Skidmore College is balancing long-term preservation and access—while easing the burden on its staff.**
> Learn how →



Digitization equipment for special collections materials

5. Classrooms, Community, and New Collecting

KEY TAKEAWAYS

Teaching has become central to archival relevance, with demand for instruction doubling or tripling at many institutions.

Community engagement is reframing archives as participatory, inclusive spaces for co-creating history and trust.

Post-custodial and nonextractive collecting shift the paradigm from ownership to relationship-based stewardship.

There's a need for more holistic metrics that capture relationship-building, ethical collecting practices, and community impact—not just numbers.

Historically, special collections and archives were primarily activated via exhibits and scholarly monographs created by experienced researchers or by curators demonstrating their knowledge of collections. More recently, there has been a shift in how repositories approach their roles as stewards of cultural memory. Public services, curatorial, and teaching and learning staff today are much more engaged in offering the collections up to wider audiences as dynamic spaces where these collections are actively mobilized to generate knowledge, foster learning, and engage diverse users.

> "We're always trying to find ways to show how our work impacts teaching, research, and community engagement."
> — Archivist interviewee

Across institutions, staff highlighted a growing emphasis on use as a central measure of a collection's (and repository's) value and visibility, particularly in connection with student engagement. Usage is also a key driver of administrative perceptions of a collection's worth. One director underscored the need to demonstrate the impact of their work, saying, "We're always trying to find ways to show how our work impacts teaching, research, and community engagement." Staff described advocacy efforts that align archival and special collections priorities with broader institutional goals, such as

advancing diversity initiatives or enhancing digital scholarship, as particularly effective in garnering support and demonstrating relevance. And despite a notorious challenge in capturing impact, repositories are seeking it: “We have to show the connection between what we’re doing and how it impacts students, the community, and how those students move forward."

Activation of these collections takes many forms: embedding primary sources into classroom teaching, building digital exhibits that tell meaningful and explicitly community-centered stories, leading fellowship programs for undergraduates, fostering community partnerships to co-create knowledge, facilitating computational research projects through embedded semester-long course support. Each of these activities activates holdings and may spark critical engagement, open up creative exploration, and generate new, sometimes unexpected, scholarship.

This shift extends beyond how materials are used to how they are collected. Archives are embracing new models of stewardship, such as post-custodial approaches and support of community archives*, which prioritize collaboration and shared authority. As one staff member said, “It’s not just about what we collect but how, why, and with whom we do this work.” Rather than acquiring materials outright, these models focus on empowering communities to retain ownership of their records while receiving institutional support for digitization, preservation, and access. These approaches fundamentally reimagine the role of the archive, moving away from centralized control to foster inclusivity and reciprocity.

Simple discovery is no longer, if it ever was, sufficient to the realization of mission. As one archivist observed, “It’s not enough to say that something is findable. We need to make it usable in ways that reflect how people actually work now.” This focus on activation highlights the expanded expectations placed on special collections and archives, particularly in the context of interdisciplinary scholarship and digital tools. Investment in, for example, digital humanities infrastructure, creating APIs for computational research, or developing teaching kits to integrate archival materials into secondary school curricula are all new areas of work for these repositories. However, the labor required to support these activities is substantial, often invisible or carried by staff on top of their other responsibilities, and challenging to quantify. This raises questions about how repositories can balance the demands of activation with the need to sustain traditional workflows.

> “It’s not enough to say that something is findable. We need to make it usable in ways that reflect how people actually work now.
> — Archivist interviewee

***Community archives**
Archives created, curated, and sustained by communities—often historically underrepresented—seeking to preserve and share their own histories, identities, and cultural heritage on their own terms.

Staff consistently highlighted the joy of this work, but the strain is evident, too. The labor required to prepare materials for teaching sessions, build user-friendly digital platforms, design meaningful community programming, or engage authentically to build the new relationships that will support alternative collection development often crosses well over anything like staff members' regular work hours. Staff described a constant balancing act, navigating the canonical demands of their work while ensuring space for the effort it takes to reshape norms and culture. This section explores the strategies, tensions, and evolving philosophies that are reshaping how archives and special collections engage with their communities.

5.1 Teaching and Learning

These initiatives are not just about building student engagement; they are about embedding archives and special collections more deeply into the intellectual life of the campus.

Across site visits, teaching and student engagement have become central to the missions of special collections and archives. Every repository reported significant growth in demand for classroom sessions, two to three times previous demand, on average. The new requests include one-off and semester-long engagements and experiential learning opportunities. Additionally, staff are increasingly asked to make materials available in reading rooms or on portals for instructional use. Repositories are also exploring new models for integrating archives into the student experience. Some have partnered with faculty to co-create courses and program curricula that center archival materials. Others teach their own courses or have developed for-credit internships, research assistantships, or fellowships specifically tied to special collections and archival projects. These initiatives are not just about building student engagement; they are about embedding archives and special collections more deeply into the intellectual life of the campus.

Staff repeatedly emphasized that while teaching has long been part of the work, it has more recently become central to how administrators perceive the importance of special collections and archives. This shift reflects a growing emphasis on engagement as a metric of value, with classes and student presence in the repository as a demonstration of institutional impact. Broader interest from professors and teaching staff in the university has also been driven by a recognition that engagement with primary sources enhances student participation and develops critical thinking skills. Data points such as the number of classes taught or the reach of undergraduate fellowship programs are increasingly used in annual reports and budget justifications. However, these metrics can sometimes obscure the qualitative impact of this work. There are the moments when a student's perspective is transformed by a single archival object, or when a fellowship participant

discovers an unexpected passion for archival practice. As one library leader put it, “The numbers are important, but it’s the stories we hear from students that really tell us we’re on the right track.”

Staff at the sites visited frequently highlighted teaching as an increasingly critical area of their work. One librarian observed that “the number of requests and classes we are doing has exploded,” yet almost all of this growth has occurred without corresponding increases in staffing or resources. Despite these constraints, teaching remains essential; as one archivist emphasized, “We can’t afford not to teach. It’s an area where our value is immediately legible to stakeholders.” In response, institutions have relied heavily on staff from various departments, such as processing, cataloging, digital systems, or conservation, to step into teaching roles. These staff members bring not only deep subject expertise, for example in theater or Southwest history, but also specialized knowledge of paper conservation or digital systems. Leveraging their diverse knowledge bases helps institutions meet growing instructional demands and clearly demonstrates the breadth and immediacy of special collections’ value to institutional stakeholders.

> **Go beyond the report: Southwestern University is meeting students where they are—by bringing special collections into their everyday research workflows.** Read more →

5.2 Community Engagement

> “We saw people light up when they found something about their family or neighborhood. It made the archive feel alive in a way that’s hard to replicate in other contexts.
> — Archivist interviewee

Special collections and archives are also increasingly embracing community engagement as a key commitment in their work. Through public programming, partnerships, and outreach initiatives, repositories are seeking ways to connect their collections within their communities. These efforts reflect a broader understanding of collections not just as tools for researchers but as cultural resources with the potential to inspire, educate, and build connections across diverse audiences. Community engagement takes many forms, from public lectures and exhibits to hands-on workshops and collaborative events. At one site, staff described the transformative impact of a program that brought local community members into the archive to explore materials related to their own histories. “We saw people light up when they found something about their family or neighborhood,” one leader member noted. “It made the archive feel alive in a way that’s hard to replicate in other contexts.”

These initiatives often focus on demystifying archives, making them approachable and relevant to broader audiences, even opening up archiving as a practice that they can engage in themselves. Open houses, "behind-the-scenes" tours, and digitization days are popular formats, allowing people to interact directly with collections while learning about the labor and expertise involved in archival work. Staff emphasized the importance of these activities in shifting perceptions of archives as static or exclusive spaces. "When people see how much care and effort goes into preserving these materials, it changes how they think about history," one archivist reflected.

Some institutions have integrated community engagement into student programming as well, bridging campus mission and community responsibilities. One site highlighted a program where special collections staff partnered with local cultural organizations and community groups to co-create programming and archival projects that were mutually beneficial. Community members were invited to collaborate on the processing, description, and interpretation of materials relevant to their histories. Their contributions brought context to the collections, ensuring that they were described authentically. Students also worked directly with community members, serving as facilitators in workshops and as collaborators in archival processing. This arrangement created a dynamic cycle of knowledge sharing: students gained hands-on experience with real-world archival projects, while community members were empowered to see themselves as active participants in shaping the narrative. As the unit leader said, "It wasn't just about collecting materials. It was about building connections and making sure those connections were meaningful for everyone involved."

As staff members work to move beyond traditional outreach methods to engage underrepresented communities, the importance of building trust and having sustainable and transitionable hand-offs within the organization is critical.

Despite the successes of these programs, staff acknowledged the challenges inherent in community engagement work. Of course, the familiar issue of time and resources is operative here, but it is specifically complicated by the stakes of the work. Building relationships in the community means building relationships with real people. As staff members work to move beyond traditional outreach methods to engage underrepresented communities, the importance of building trust and having sustainable and transitionable hand-offs within the organization is critical.

5.3 Reimagining Collection Development

In recent years, academic libraries and archives have increasingly embraced new stewardship approaches, ranging from targeted repatriation activities to broader adoption of ethical stewardship models grounded in community

engagement. These models and orientations to collection development challenge long-standing assumptions that collections must physically reside within an institution to be accessible, safe, and secure. Traditional priorities, which maybe once emphasized linear growth and the rarity or perceived value of materials, are giving way to practices that foreground shared authority, inclusivity, and sustainability. These shifts reflect broader cultural pushes from within the profession to address historical inequities and establish repositories as spaces for community-driven narratives and reparative practices.

Post-Custodial and Nonextractive Collecting

These models and orientations to collection development challenge long-standing assumptions that collections must physically reside within an institution to be accessible, safe, and secure.

Post-custodial and nonextractive collecting* challenge traditional notions of ownership and stewardship in archives. These approaches place the focus on collaborative relationships with communities, emphasizing shared authority over cultural materials. Instead of removing items from their originating context, these models support communities and creators in preserving, describing, and accessing their collections as they maintain their connection to and control over unique cultural material, while institutions provide expertise and resources to ensure the preservation and viability, if not always accessibility. “We’ve realized that taking materials out of their community can sever vital cultural and historical connections,” one unit leader reflected, highlighting an evolving ethos of partnership over possession.

Nonextractive collecting focuses on minimizing disruption to a community’s access and use of their materials, creating opportunities for shared stewardship without the necessity of transfer. In practice, these models often center around checks on institutional power that might once have been unthinkable. For example, during a discussion of Indigenous collections, one curator noted that as they consider bringing these materials under institutional control, “Often, the answer is no. Our role is to support their stewardship, not to take it over.” This is especially critical for materials of high emotional or cultural value to the communities that created them.

***Post-Custodial Collecting**
An archival approach in which institutions support the preservation, description, and access of materials without taking physical or legal custody of them.

***Nonextractive Collecting**
A stewardship model focused on minimizing institutional disruption to community access, ownership, and interpretation of their own materials.

> Post-custodial collecting isn't just a new workflow. It's a new way of thinking about what it means to collect.
>
> — Archivist interviewee

"Sometimes the materials aren't ready to come to the collection," one archivist noted, "but helping people think about what's important and how to save it is an invisible part of what we do." These acts of care reinforce the idea that archival stewardship is not only about preserving materials according to established professional standards, but also about actively contributing to bolster the social and cultural power of the materials. "Post-custodial collecting isn't just a new workflow. It's a new way of thinking about what it means to collect," one archivist explained. Nonextractive practices in action might include consulting with community members and/or creators about preservation needs, supplying preservation materials like acid-free folders or mylar sleeving, assisting with or providing digitization services, and helping to develop and generate metadata that respects cultural contexts and community knowledge. By leveraging their systems to support the dissemination of digital materials and enabling broader discovery, repositories also extend the value of their work beyond institutional boundaries. This approach positions them as suppliers of domain-specific expertise and stewards of cultural heritage, creating reciprocal relationships with communities and enhancing the visibility and accessibility of collections.

When repositories adopted this perspective, collection development looks very different. For the many repositories without curatorial staff, this can be a more natural evolution. For those with dedicated and sometimes large curatorial teams of four or more staff, it can represent a bigger turn for their traditional work, requiring new ways of considering what kinds of value their efforts bring to the repository. Value may now encompass the quality and impact of the relationships developed with communities and creators. By engaging in open dialogues about preservation and representation, repositories move toward more collaborative and inclusive models of stewardship. Fostering these kinds of relationships entails acknowledging and respecting the expertise and agency of communities whose histories and materials are being preserved. And supporting community agency means actively involving creators and stakeholders in decisions about how their materials are described, digitized, preserved, and made accessible. This process helps ensure that archival practices honor cultural contexts and avoid imposing institutional priorities that may inadvertently erase or misrepresent community perspectives.

The principles of post-custodial collecting naturally challenge traditional notions of ownership, but this framework does not rule out acquisition. In finding nonextractive means of building their institutional collections, curatorial and collection development staff are also guided by the concept of

reproducibility, as applied to the acquisition of materials like photographs. One curator described a deliberate pivot in collection development toward acquiring reproducible materials, which allows creators to sell or otherwise distribute other copies of their work. At another repository, a collaborative project with a community archive involved digitizing a collection of photographs and producing high-quality prints that were returned to the community along with the digital files. These physical reproductions offered a powerful new way for the community to tell and see its stories. As the unit leader in charge of this project explained, "People would put these photos in their local coffee shops, schools, and churches—it created this ripple effect where the history became part of daily life." This practice highlights how reproducible materials can bridge institutional priorities with community-driven storytelling, enabling activation of the collections far beyond the repository itself.

> "People would put these photos in their local coffee shops, schools, and churches—it created this ripple effect where the history became part of daily life."
> — Unit leader

This shift toward post-custodial and nonextractive collecting does not simply require new policies or workflows; it requires new ways of recognizing and accounting for the labor that sustains such work. These approaches rely on individuals who spend significant time and effort to build trust, navigate sometimes difficult conversations, and ensure that institutional goals align with community needs and desires. This work is slow, often unfolding over months or years, and it resists traditional institutional metrics which may fail to capture the depth of engagement required to support ethical collecting practices.

As one repository leader put it, "The hardest work we do—building relationships, fostering trust, supporting nuanced research—is invisible in our reporting." Another archivist reflected, "We measure what we can count, but we don't always count what matters." The challenge is not just that this work is difficult to quantify; it's that the value it brings is often only felt over time. Certainly, traditional curatorial work has always involved long-term relationship-building, but the kinds of marquee collections and potential resourcing that emerge on the other end of that work may be distinctly different within these frameworks. In response, some institutions are turning to more holistic or "hybrid" metrics that capture not only immediate outputs but also collaborative depth, community impact, and the sustained relevance of collections.

> "We measure what we can count, but we don't always count what matters."
> — Archivist interviewee

One site, for example, evaluates its reparative description projects by analyzing both user engagement with revised records and new research generated around materials previously relegated to the margins. Another measures success through its partnerships with community organizations, tracking how well those relationships foster reciprocal, mutually beneficial

endeavors. While such approaches offer a richer understanding of archival impact, they also introduce new challenges. Relational and ethical indicators can be difficult to measure systematically, and under resourced repositories report challenges in gathering and interpreting the data, relying on the goodwill of administrators to continually greenlight their work on these collecting initiatives.

Community Archives

While post-custodial and nonextractive collecting models aim to redefine institutional-community relationships through collaborative and ethical stewardship practices, community archives initiatives reflect an even broader ambition. These initiatives extend beyond individual collections or simple institutional partnerships to actively empower communities, fostering a sense of ownership and visibility over their own histories. As one archivist observed, "We're not just saving collections. We're creating spaces where communities can see themselves and claim their histories." Community archives initiatives also take a step further along the path of prioritizing capacity-building over immediate outcomes. This includes formally equipping communities with the knowledge, tools, and resources they need to sustain their own archives. Initiatives might involve co-navigated education and training that tackle archival basics like preservation or description, support for grant applications, and policy advocacy at institutional, regional, or national levels.

Community archives initiatives tend to recognize the interconnectedness of local and global histories. Many initiatives seek to link individual community efforts with larger movements for social justice, equity, and cultural preservation. This broad perspective ensures that the stories preserved by community archives contribute to a more inclusive and comprehensive understanding of history. As one participant in a community archive initiative put it, "This isn't just about fixing what's broken, it's about building something new." While post-custodial and nonextractive collecting might focus on reimagining specific institutional practices, community archives initiatives aim to transform the entire landscape of archival work. They address questions of who gets to tell history, how resources are distributed, and what it means to preserve memory in equitable and sustainable ways. As one archivist noted, "We're learning to let go of ownership as the measure of stewardship. Instead, we're asking how we can support communities in telling their own stories." By situating community archives initiatives as a broader proposition, archivists and librarians in these sites say that their efforts are not just about collections or partnerships but about rebuilding their field in a way that centers community agency, justice, and resilience.

"

We're learning to let go of ownership as the measure of stewardship. Instead, we're asking how we can support communities in telling their own stories.

— Archivist interviewee

Of course, effective partnerships toward justice and resilience require sustained institutional and community commitment. Community archives initiatives require a fundamental shift in how administrative buy-in is conceived and measured. Unlike traditional archival programs, which often align their goals with institutional metrics such as collection growth or research citations, these initiatives prioritize intangible outcomes like community trust, cultural sustainability, and empowerment. This reorientation necessitates administrative support for frameworks that value relational work over transactional outcomes. As one archivist noted, the value is in "how deeply we're *connecting*." Leaders are asked to recognize the value of labor-intensive practices like relationship-building, community consultations, and long-term capacity-building, which may not yield immediate, quantifiable results. Success metrics in this context might include increased community participation, evidence of community-led projects, or expanded access to underrepresented histories. "We're asking administrators to think differently about value. This is about impact that can't always be counted but is deeply felt," one initiative leader emphasized. External grant money goes a long way to convince administrators, but may introduce sustainability issues for these initiatives when such funds are no longer distributed.

6. Conclusion

KEY TAKEAWAYS

Special collections and archives are navigating a pivotal moment of transformation amid competing demands and limited resources.

Professionals face a gap between ideal standards of care and the practical realities of daily archival labor—often resolved through a mindset of "selective preciousness."

Stewardship is increasingly a negotiation: balancing preservation, access, ethics, and institutional relevance in a rapidly digital and interconnected world.

Adaptation with integrity—not abandonment of values—is the path forward, requiring flexible, context-aware interpretations of archival best practices.

Special collections and archives are navigating a period of profound transformation, marked by shifts in how institutions prioritize, manage, and engage with their collections.

Special collections and archives are navigating a period of profound transformation, marked by shifts in how institutions prioritize, manage, and engage with their collections. These changes reflect the challenges and opportunities of a rapidly evolving landscape, one in which traditional practices are being reexamined in light of new ethical, technological, and operational demands. This report reflects librarians' and archivists' experiences and thoughts on the complexities of these transitions, revealing a field grappling with resource constraints, restructuring, and the need to adapt to a digital-first environment. It also highlights the resilience and ingenuity of the staff members driving these changes, whose commitment to care, collaboration, and innovation is reshaping archival and special collections work.

The professional ideals governing special collections and archival practices emphasize meticulous care and adherence to rigorous standards, embodying a collective commitment to ensuring the long-term preservation and accessibility of unique and rare materials. These ideals have historically

conjured images of white-glove handling, controlled environments, and highly restricted access—an ethos of exacting precision. Yet, the realities of limited resources force staff to navigate compromises, tempering these ideals with the operational demands of day-to-day work. The concept of "selective preciousness"* may offer a useful lens for understanding how these layered realities manifest in practice, highlighting the uneven application of attention, care, and resources across collections and workflows in the context of resource constraints specifically.

> "We know the right way to do things, but we're forced to make hard choices about where to apply that knowledge.
> — Archivist interviewee

Selective preciousness describes a dynamic where certain materials, tasks, or processes are at least nominally held to the highest standards of archival practice, meticulously processed, carefully described, imaged to the highest standards, and rigorously preserved, while others are (almost necessarily, due to the number of hours in the day or dollars in the budget) streamlined, skipped, or deferred. This phenomenon is not indicative of negligence but rather of a deeply ingrained professional ethos that strives for perfection, even in the face of insurmountable challenges. As one archivist keenly observed, "We know the right way to do things, but we're forced to make hard choices about where to apply that knowledge." Staff describe instances where long-standing professional norms clash with the pragmatic demands of resource allocation. As one participant shared, "When we can, we follow the gold standard, but most of the time, we're just trying to make it work."

Regardless of their resources, size, or ambitions, special collections and archives all face a paradox of abundance and limitation. They hold materials rich with evidence of human creativity, resilience, and complexity, yet continually face constraints in staffing, resources, and consensus about priorities. Staff encounter this tension between ambition and reality every day. While this gap between aspiration and capacity can be frustrating, staff and leadership consistently transform it into an opportunity to re-examine assumptions about stewardship, relevance, and the potential for meaningful impact in a digitally evolving landscape.

Addressing this gap requires institutions to adapt professional ideals with intention, integrity, and flexibility. Bridging aspirations and everyday constraints involves honest conversations about priorities, trade-offs, an the ethical responsibilities inherent in archival and special collections work.

***Selective Preciousness**
Selective preciousness is the practice of applying the highest standards of care to certain materials, tasks, or workflows, while necessarily streamlining, deferring, or omitting others due to finite institutional resources. It reflects not negligence but a professional ethos oriented toward excellence, shaped by the tension between ideal standards and real-world constraints.

While this gap between aspiration and capacity can be frustrating, staff and leadership consistently transform it into an opportunity to re-examine assumptions about stewardship, relevance, and the potential for meaningful impact in a digitally evolving landscape.

Rather than rejecting professional values, staff must find principled yet pragmatic ways to flexibly adapt them to current realities. Engaging with these ethical and practical questions invites a shift away from rigid binaries, such as ideal versus compromise or abundance versus scarcity, and opens space for more nuanced, transformative possibilities. Through this flexibility, ideals can evolve meaningfully, aligning more closely with what is both achievable and impactful in contemporary contexts.

Special collections and archives act as custodians of time, preserving records of the past while responding urgently to the present. Yet each tick of the clock signals the further accumulation of unprocessed backlogs, another deferred promise of digital preservation, and the continued slow pace of systemic change, even as bold and highly capable knowledge workers push for transformation within systems not built for rapid evolution. The work of archives and special collections today is not merely a reflection of what was, but an ongoing negotiation with what might be. Each decision about what to preserve, process, or prioritize represents a careful balancing of permanence and impermanence, ambition and constraint. It is here, in these negotiations, that stewardship is redefined. Archivists and special collections staff embody the complexities of their dual role as protectors and adapters, safeguarding materials that will enable future understanding of the past while simultaneously adapting practices to meet the evolving demands of a digital and interconnected world.

> **Go beyond the report: Archivists co-designed an AI-powered tool to accelerate descriptive work—while keeping humans in control.**
> Learn more →

A Note of Gratitude for Your Trust and Care

Bridging Capacity and Care was commissioned by JSTOR because we knew enough to recognize how much we had to learn. If we were serious about building something genuinely useful for the archives and special collections community—something that could offer meaningful support—we had to start by listening.

What you shared with us was generous, candid, and painted a vivid picture of a field carrying immense responsibility—often without the support it needs or the recognition it deserves. That clarity helped us understand where a mission-aligned, not-for-profit like ITHAKA might contribute most effectively—by removing barriers that limit the impact of your work, and by showing up as a partner, not a prescriber.

JSTOR Digital Stewardship Services exists because of what we learned here. The insights reflected in this report continue to guide how we listen, what we build, and how we move forward—in collaboration with you.

Thank you for your trust, and for the essential work you do every day.

Bruce Heterick
SVP, Open Collections and Infrastructure
ITHAKA