

A large, jagged iceberg floats in the ocean under a cloudy sky. The iceberg's surface is textured with ridges and grooves, and its edges are sharp and uneven. The water around the base of the iceberg is dark and turbulent, with white foam from the waves visible at the bottom of the frame.

Total Cost of Stewardship:

**Responsible Collection Building in
Archives and Special Collections**

Total Cost of Stewardship: Responsible Collection Building in Archives and Special Collections

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The ideas and tools presented in this publication are a product of the significant contributions and collaboration of all members of our working group.

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INTRODUCTION

Archives and special collections are charged with collecting materials that document our society and its institutions as well as with the ongoing, **responsible stewardship** of these records. Yet many archives and special collections struggle to manage the volume of materials under their care. Accumulations of inaccessible, poorly described collections and inadequately preserved materials can create a breach of the trust we hold with collection donors and users.⁸

Responsible Stewardship

An institution's commitment to making informed, ethical, and transparent decisions about how to provide care for the collections entrusted to it. Responsible stewardship also assumes that a realistic assessment of institutional capacity is factored into every acquisition decision.

The profession has made remarkable strides in the last two decades to develop thoughtful, rigorous methodologies to carry out cataloging and processing work in a more efficient manner. But this approach alone has only made a dent in backlogs.

A key to making informed collection development, appraisal, and collection management decisions is a strong understanding of the necessary institutional resources and capacity for the work to preserve, describe, store, and make accessible collection materials. But in many institutions, those tasked with building collections are separate from those tasked with the ongoing stewardship work of collections. Because of this operational divide, institutions may lack clear, timely, and actionable information on the institution's capacity to care for its collections, making a holistic approach to acquisition, appraisal, and stewardship decisions especially challenging.

OCLC Research's *Research and Learning Agenda for Archives, Special and Distinctive Collections in Research Libraries* (2017)⁹

called for a renewed focus on appraisal as part of comprehensive strategies to fulfill our stewardship obligations. In response, the OCLC Research Library Partnership convened the Collection Building and Operational Impacts Working Group in 2018, led by Senior Program Officer Chela Scott Weber. The working group explored the intersections between current collecting and collection management practices. These efforts aimed to find ways to better integrate collection management considerations into the collection development process and to bring together colleagues across these important, interdependent functions.

The CBOI Working Group developed a **Total Cost of Stewardship Framework** for thinking about the full range of resources necessary to responsibly acquire and steward archives, rare books, and special collections, and the impact that collection acquisitions have on operational capacities. The Total Cost of Stewardship Framework takes into consideration the cost to acquire, care for, and manage a potential acquisition, the labor and specialized skills required to do that work, and institutional capacity to care for and store collections.

In addition, our group created a **Total Cost of Stewardship Tool Suite**. We understood there was a need for better data about collection stewardship needs as well as for better communication across disparate roles and responsibilities. To address this, we created two types of tools:

- **Cost estimation tools** to make informed estimations of the cost and impact to institutional capacity required to steward a potential acquisition¹⁰
- **Communication tools** to document and share knowledge about a potential acquisition across all the roles involved in collection development and collection management¹¹

The tools are intended to be flexible and customizable for use by a wide range of institutions and users as well as be adaptable to local contexts and needs.

The Total Cost of Stewardship Framework takes into consideration the cost to acquire, care for, and manage a potential acquisition, the labor and specialized skills required to do that work, and institutional capacity to care for and store collections.

This report shares the outcomes of the Collection Building and Operational Impacts Working Group efforts. It lays out the context and makes an argument for shared, informed decision-making in collection building activities, introduces a framework for how those collection decisions can be made, and offers advice and a tool suite to operationalize that framework.

Context

Grounded in a concern about sizable backlogs of un- and under-described materials in archives and special collections, our profession has been involved for more than a decade in an ongoing and evolving discussion about how to best allocate limited resources to address backlogs and to generally be responsible stewards of the collections and resources entrusted to our care. What started with “More Product, Less Process” (2005)¹² as a conversation about using professional judgment to make efficient decisions in the realm of processing archival collections broadened to include the full range of collection management program decisions with work like Dan Santamaria’s *Extensible Processing for Archives and Special Collections* (2014).¹³ Our working group sought to extend that discussion further, bringing these **collection management** decisions into relationship with collection acquisition decisions and to consider the necessary work to preserve, describe, and make materials available as part of the full cost of ownership of the collections we acquire. It is also our hope that by quantifying and making this labor more visible, we can support advocacy efforts for the resources needed to responsibly manage the collections in our care and meet our obligations to creators, donors, and researchers.

Collection Management

All of the activities that are necessary to ensure that collection material is described, discoverable, and available for use. This includes accessioning and processing, cataloging, conservation, and digitization.

Capacity Constraint

Factors that limit production, performance, or output. In the Total Cost of Stewardship context, a capacity constraint impacts an institution's ability to accomplish collection management activities.

While we are accustomed to thinking of an annual collecting budget as a constraint on collecting, we are not as accustomed to thinking about our capacity to steward as a constraint. In a **capacity constraint** model, the activities of an entity are governed by an honest, holistic, and accurate assessment of resources. In the context of library operations, a clear understanding of current collection management capacities should inform both collection development decisions and fundraising and development planning.¹⁴

Collecting beyond our capacity to steward builds the backlogs of uncatalogued and unprocessed material that are a known and enduring challenge in archives and special collections. A 1998 survey of Association of Research Libraries (ARL) member institutions found significant backlogs in special collections.¹⁵

OCLC Research conducted a follow-up version of the ARL survey with a broader group of US and Canadian research libraries in 2009. It revealed similar—and in some cases, even larger—backlogs in some categories. It showed that 15% of printed volumes and between a quarter and a half of archive, manuscript, and special collection formats lacked an online catalog record or finding aid.¹⁶ OCLC Research's 2013 survey of special collections held in research libraries in the United Kingdom reveals a similar situation, with 21% of printed volumes, 35% of archival collections, and 42% of single item manuscripts without online descriptive records.¹⁷ Quantifying these backlogs led to a now decades-long conversation about “hidden collections,” which recognizes backlogs as problematic from collection management and resource allocation perspectives, as well as potentially from legal and ethical perspectives.

Collecting beyond our capacity to steward builds the backlogs of uncatalogued and unprocessed material that are a known and enduring challenge in archives and special collections.

To try to address these backlogs, institutions have largely focused on two different types of solutions. The first explores how processing, cataloging, and other collection stewardship work in special collections could be done more efficiently. The second is raising infusions of soft funds to create temporary positions to supplement existing collection stewardship resources.

Efficient archival processing strategies have now been codified and are widely used.¹⁸ Special collections material that might have once been cataloged in individual bibliographic records are now efficiently and robustly described in aggregate,¹⁹ and alternative cataloging approaches have been explored to try to address rare book backlogs.²⁰ From 2008-2014, the Council on Library and Information Resources (CLIR) ran the Cataloging Hidden Special Collections and Archives Program,²¹ supporting projects that both addressed descriptive backlogs and developed innovative and efficient approaches to their work. In reflecting on the seven years of Hidden Collections, CLIR acknowledged just how widespread efforts toward efficiency in descriptive practice had become, stating: “Once uncommon, these kinds of innovations are now part of everyday workflows at many institutions—so much so that they can hardly be called ‘innovations’ anymore.”²²

Even with these efficiencies, many institutions continue to rely on soft monies and workers in temporary and term positions to address ongoing collection stewardship needs and backlogs. Research by Sayles, Johnson, and Vo on term employment in the archives field in the United States found that a quarter of archives jobs advertised between 2014-2020 were term positions, and 87% of workers currently in term positions listed technical services activities as their primary responsibility.²³ Another recent survey of library, archive, and museum workers in term positions found that 66% of respondents rehired at the same institution were hired into another term position, pointing to the pattern of continued dependence on insecure labor.²⁴ There is growing recognition and concern in the profession about the impacts—to both institutions and individuals—of overreliance on and long-term use of temporary positions.²⁵

Collection Building

All activities that contribute to the creation of a body of collections, broadly. This includes acquiring collection material through transfer, donation, or purchase, and creating digital collections through digitization, web archiving, and other means.

In 2017, balancing backlogs and collection stewardship responsibilities was identified as a continuing challenge in need of attention for research libraries.²⁶ The persistence of this issue makes clear that it cannot be addressed solely through increased efficiency in technical services and infusions of extra labor, and that capacity constraint must be a regular part of **collection building** conversations. Collection management and collection development are linked by institutional capacities and therefore must be considered together.

Our collection development decisions have manifold ethical implications embedded in our responsibilities to diverse constituents. We owe it to our researchers to preserve and describe collections within a reasonable timeframe. We owe it to collection creators and donors to speak in realistic terms about our capacities for processing, preservation, storage, and access. And we owe it to our administrators to use real data to convey our capacities, or lack thereof, when planning for future operations.

Our collection development
decisions have manifold
ethical implications, embedded
in our responsibilities
to diverse constituents.

Total Cost of Stewardship

We offer the concept of **Total Cost of Stewardship** to consider the full and true resources required to bring in and responsibly care for a collection acquisition. This borrows from the idea of total cost of ownership, defined as the initial cost to purchase something plus the costs of ongoing operation as well as those of necessary upgrades and maintenance. It is a generally useful construct to help buyers and owners determine the direct and indirect costs of a product or system. However, its focus purely on ownership leaves out an important ethical dimension that is central to the values of the library and archives profession.

Total Cost of Stewardship

All of the costs associated with building, managing, and caring for collections so they can be used by and useful to the public.

Librarianship is a profession with codified values intended to guide our work. The American Library Association outlines professional ethics for librarianship broadly, “to guide ethical decision making.”²⁷ Professional values specific to work in archives and special collections are further codified in documents from our major professional organizations and emphasize the importance of providing access to the rare and unique materials in our care.²⁸ The RBMS Code of Ethics begins by acknowledging that special collections “practitioners have particular responsibilities and opportunities associated with caring for cultural property, preserving original artifacts, and

supporting both community engagement and scholarship with primary research materials.” It goes on to emphasize the importance of providing access to collections as part of that responsibility, calling for special collections practitioners to “demonstrate a proactive commitment to broad, equitable access to all materials under their stewardship, and constantly strive to improve collections access for all users.”²⁹ The Society of American Archivists specifies “access and use” as one of the archival professions’ core values, stating “the goal of use should be considered during every phase of acquisition, description, and access.”³⁰

Total cost of stewardship adds an ethical layer to cost considerations, asking: “What are the costs of performing the work that our professional values outline in relation to this acquisition?” Archives and special collections in research and cultural heritage institutions hold their collections in trust for the public. It is not enough simply to own collection material; collections must also be maintained in a state such that the public can benefit from them. Total cost of stewardship acknowledges that responsible collecting does not stop at acquisition but considers all the activities that are necessary to make collections accessible and deliver on our promises to collection donors, creators, and the people and communities those collections document. This approach accounts for direct costs like purchase price and other acquisition expenses, as well as the ongoing operational costs of stewardship like cataloging, processing, preservation, and digitization.

Total cost of stewardship adds an ethical layer to cost considerations, asking: “What are the costs of performing the work that our professional values outline in relation to this acquisition?”

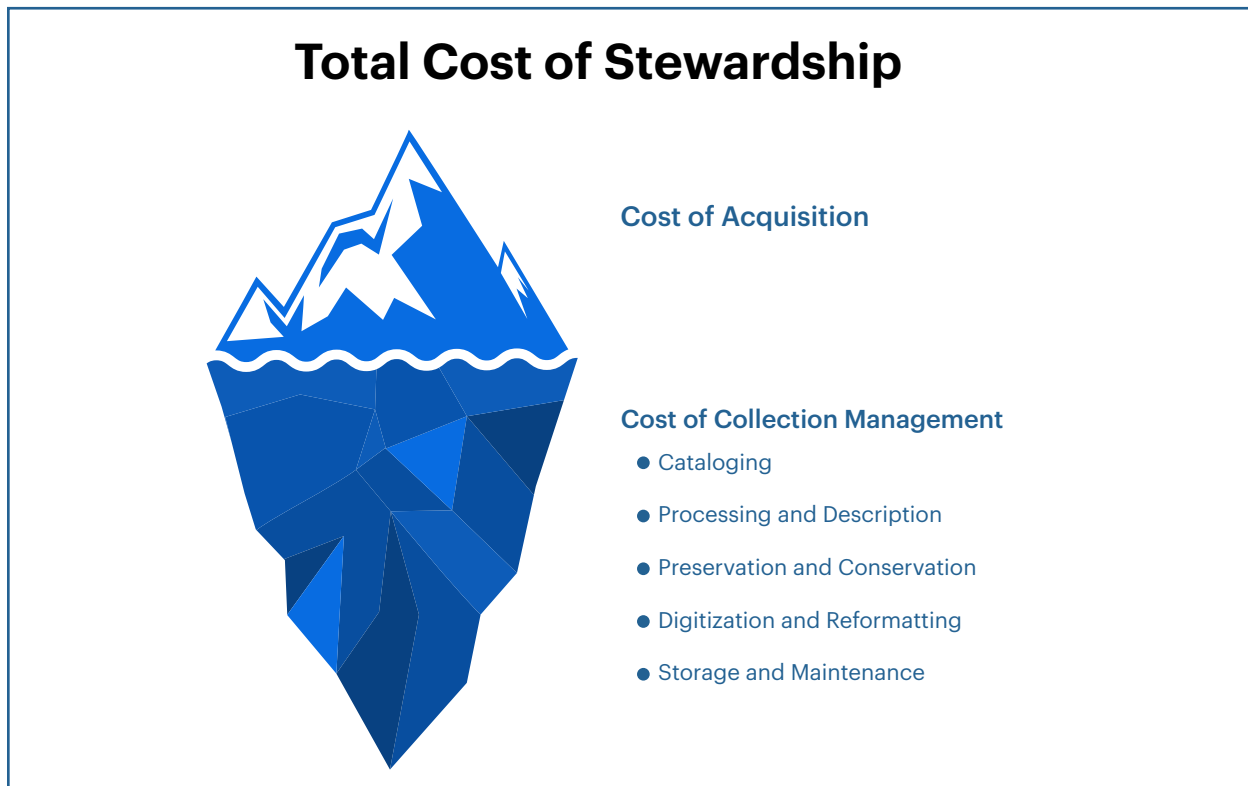


FIGURE 1. Total cost of stewardship

BENEFITS OF CONSIDERING TOTAL COST OF STEWARDSHIP

Considering stewardship needs in acquisition discussions helps to center discovery and access from the outset of a collection's time in a repository. It allows for a shared understanding of the work needed to support the valuable attributes of any given acquisition. When our institutions balance collecting volume and stewardship, they can commit to making new acquisitions accessible in a timely manner and focus on work that will best support the richness and research value of an acquisition.

Recognizing the true costs of stewardship are indispensable to planning and advocacy for special collections programs. In laying out these costs, curators and collections managers become better equipped to assess and plan for a potential acquisition. Collection donors can be better informed of the scale of investment in their collections, helping them to understand the process not only as an acquisition by the institution, but also as a choice by both donor and institution to preserve and make available the materials. This may influence purchase negotiations or help an institution to advocate for the donation of processing, cataloging, or preservation funds. Similarly, a better comprehension of the actual costs of—and ongoing need for—processing and cataloging labor is essential for informing advocacy efforts around creating and sustaining permanent positions. An accurate conception of the costs of building a program is critical to the ongoing management and sustainability of that program. Understanding what is in our collections, via cataloging and processing work, allows us to show the value of these collections and allows others to use them and demonstrate that value through their research, teaching, and myriad projects our collections support.

Recognizing the true costs of stewardship are indispensable to planning and advocacy for special collections programs.

Considering total cost of stewardship can help institutions address some of the challenges of contemporary collecting practice. Repositories are increasingly collecting born-digital materials, often in formats that deteriorate quickly and will not weather the benign neglect of sitting in a backlog in the same way as analog formats. These formats may also require specific equipment and expertise in order to preserve and provide access to them, or time to experiment and problem solve as repositories contend with the challenges of dealing with both legacy media and emerging technologies in their born-digital program.³¹ Audiovisual materials offer similar challenges, with media-specific needs and an ever-shrinking window of time to address magnetic media and other degrading media formats. Outlining current institutional resources in terms of labor hours, expertise, and technical capacities can help ensure that born-digital and audiovisual materials are cared for in the timely manner they require, and that the institution is not taking on material it cannot responsibly steward. Taking inventory of technical capacities allows for planning and resource allocation for collections that might require time for research and experimentation, the purchase of new equipment, or assistance from a vendor.

Clearly defining stewardship needs and capacities can ensure we have the resources to live up to the promises we make to these communities about how we will care for their collections.

Many predominantly white institutions are increasingly looking to address the lack of diversity in their collections via collaboration with community archives, post-custodial collecting models, and other nontraditional forms of collecting that can help to broaden the people and communities represented in our collections.³² Most collection building work relies on relationship building, but these models of collecting are especially and necessarily labor intensive, requiring time and attention to build significant trust between the repository and the creator or creator community. Clearly defining stewardship needs and capacities can ensure we have the resources to live up to the promises we make to these communities about how we will care for their collections. Similarly, some institutions are re-examining their existing collections to attend to the people and stories currently silenced via backlogs or inadequate description. Examination and redescription of these collections require skilled and sensitive labor. Considering total stewardship capacity can keep important work like this from being overlooked in favor of work on new acquisitions, avoiding collecting at the expense of the hidden voices already in our collections and the absent scholarship they could have supported.

Comparing Cost and Value

Of course, costs alone are insufficient input to make informed collection building decisions. The potential value of a collecting opportunity must also be assessed so that they can be considered alongside each other. While value isn't as easily quantifiable, regularly assessing value is just as important to rigorous consideration of collecting opportunities as assessing costs. There are multiple types of value a potential acquisition might have and benefits it might bring to a repository, among them are research, documentation, or artefactual value; the value to mission of an acquisition that will be a strong support for curricular priorities; or the recognition and public relations value that a high profile acquisition can bring to an institution.

A clear articulation of how a potential acquisition is valuable helps to share this knowledge across roles and achieve greater buy-in from all involved in collection building decisions.

Every potential acquisition is an opportunity to bring different facets of value to the institution. But it is important to be explicit about what that value is and methodical about assessing value across different opportunities. Deciding what is valuable to your institution and regularly assessing collections against those priorities allows for identification of the full range of potential value a collection might bring to an institution, how that value can support mission and strategic goals, and how it supports more consistent and equitable comparisons across collecting opportunities. A clear articulation of how a potential acquisition is valuable helps to share this knowledge across roles and achieve greater buy-in from all involved in collection building decisions. Documenting and sharing this knowledge at acquisition also allows it to be understood and taken into consideration in subsequent steps in the stewardship life cycle.

Opportunity Cost

The loss of potential gain from other alternatives when one alternative is chosen. In the Total Cost of Stewardship context, acquisition, resource allocation, and other decisions have potentially significant opportunity costs.

Annual Capacity for Stewardship

The amount of labor, supplies, and other resources an institution can devote to stewardship activities annually. It can be estimated using the Operational Impact Estimator.

A careful consideration of both value and cost of stewardship allows an institution to consider them in relation to one another, clarifying important factors needed for decision-making and documenting these factors for current and future colleagues. It supports informed discussion of what work is needed to best reveal and emphasize the value of a potential acquisition. Weighing the costs to steward against the institution's **annual capacity** for that work supports thinking in terms of the **opportunity cost** of a potential acquisition. It helps to assess if an acquisition has enough potential value to make it worth saying "no" to a different acquisition or moving another collection further down in the cataloging or processing queue.

The Total Cost of Stewardship Framework

We advocate for a **Total Cost of Stewardship Framework** that takes into consideration the potential value of a new acquisition alongside all of the responsibilities associated with stewarding it. These responsibilities include illuminating the lives the collection represents, nurturing our relationship with the collection creator and their communities, making the collection available in a timely and equitable way, and valuing the labor and expertise that our colleagues contribute to these efforts. The programmatic, four-pronged approach presented here is an attempt to operationalize these lofty aims by providing guidance and tools for asking the questions, making the calculations, and sharing the information that underpins every collection-related decision. The framework starts with **documenting collecting priorities** and **determining stewardship capacity**, which supports activities to **gather and share information**, and, ultimately, the ability to **make decisions together**.

The tool suite supports the framework with communications templates and cost estimation tools that enable consistent examination of both value and cost in any collecting opportunity.

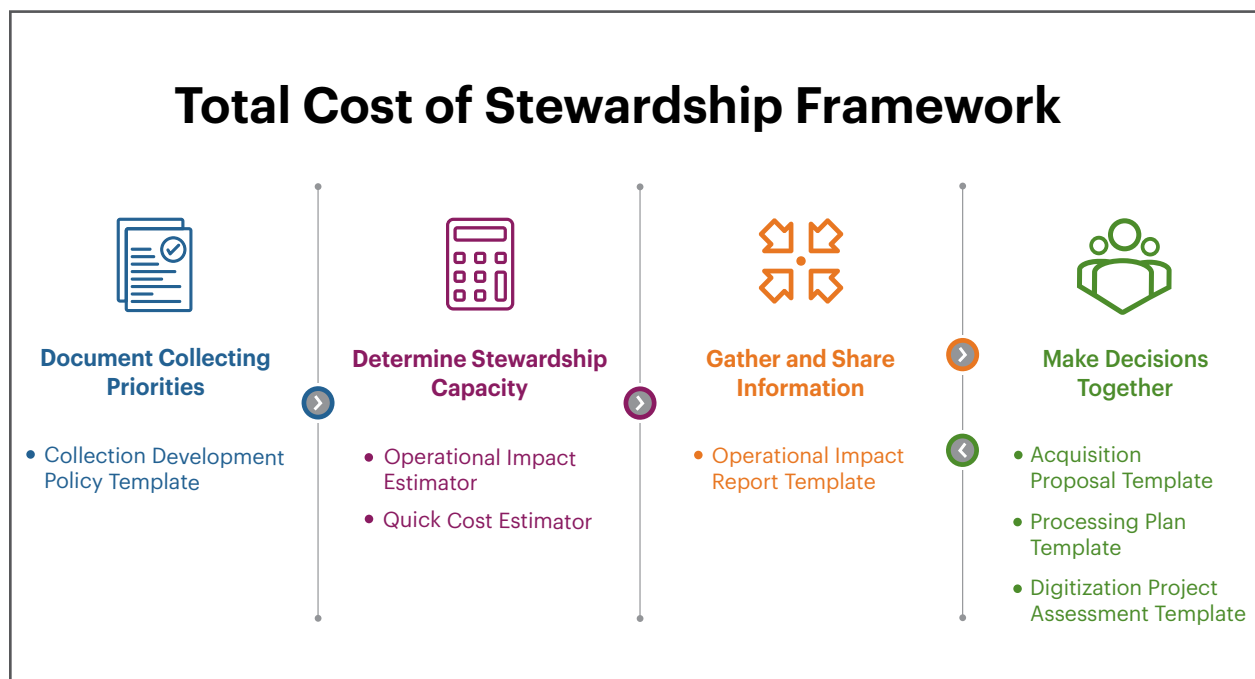


FIGURE 2. Total cost of stewardship framework

The tool suite supports the framework with communications templates and cost estimation tools that enable consistent examination of both value and cost in any collecting opportunity. Each section below describes the four parts of the framework and summarizes the corresponding tools to support work in that area.

DOCUMENT COLLECTING PRIORITIES

A written **collection development policy** is foundational for making informed collection development decisions that align with institutional mission and goals. The policy can be used to articulate institutional priorities that should be considered with assessing potential acquisitions—both gifts and purchases—for assigning processing or cataloging priorities to backlogged collections. For some repositories, a single, overarching collection development plan or strategy is appropriate for explaining the role of the collection within the parent organization. This approach draws attention to the programs and activities the collection is intended to support and describes the priorities and areas of emphasis around which collection-related decisions are made. In other repositories, multiple collecting policies or collection statements may be needed to adequately reflect a range and variety of collection strengths and to guide and inform collection development decision-making that is a distributed or shared responsibility.

A written **collection development policy** is foundational for making informed collection development decisions that align with institutional mission and goals.

In any case, if your repository does not have a collection development plan, write one (see figure 3). If existing collecting policies are outdated, review and revise them. Be sure to factor into the process current institutional goals and initiatives—such as those around diversity, equity, and inclusion—that are expected to influence or will have an impact on collection development decision-making. Once written, your collection development policy becomes a living document that will likely serve different purposes over time. As such, it should be revisited on a regular basis as well as when a change in circumstances warrants an ad hoc review and should be revised accordingly.



**Document Collecting
Priorities**

The **Collection Development Policy Template** can be used when preparing a new or revising an existing collection development policy. It offers high-level guidance for key content to be provided in 10 areas, including History of the Collection; Audiences For, and Programs and Activities Supported By, the Collection; Current Collecting Focus and Priorities; Reappraisal, Transfer, and Deaccessioning; and Procedures for Revisiting and Revising the Policy. Organized in modules, the template encourages flexibility and accommodates a phased and collaborative approach to writing or revising a collection development policy.

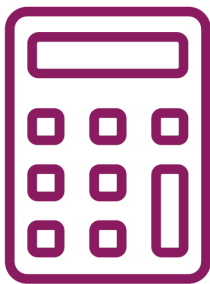
FIGURE 3. Document collecting priorities

DETERMINE STEWARDSHIP CAPACITY

Delineating capacity to care for collections is just as important as defining policy for acquiring them. For this reason, arriving at a determination of overall stewardship capacity is the second element in the Total Cost of Stewardship Framework (see figure 4). And while collection budgets and space considerations, for example, are typically (and appropriately) factored into collection-related decisions, considerably less attention has been given to the human resource constraints that can, and do, have a very significant impact on stewardship capacity.

Delineating capacity to care for
collections is just as important as defining
policy for acquiring them.

Estimating annual capacity for stewardship activities is more art than science, and its accuracy and potential usefulness are dependent on the information to which individuals in various roles have access. One of the most important inputs in a capacity estimate is the number of labor hours that can be allocated to various stewardship tasks, including accessioning, cataloging, processing, conservation, reformatting, and digitization, as well as administrative and advancement activities including advocacy and fundraising. Other inputs include unoccupied shelf space, server storage capacity, and available funds that can be used for stewardship needs including equipment, supplies, transportation, and vended or outsourced solutions.



**Determine Stewardship
Capacity**

The **Operational Impact Estimator** and the **Quick Cost Estimator Worksheets** are intended to make it as easy as possible for repository staff to determine overall stewardship capacity and to estimate the costs associated with various activities including accessioning, processing, and cataloging. Both are essential for identifying and explaining the operational impact of bringing in a particular collection. An accompanying Manual provides step-by-step instructions for using the tools, along with guidance on customizing inputs and outputs and adopting an iterative approach to estimating capacity and costs.

FIGURE 4. Determine stewardship capacity

GATHER AND SHARE INFORMATION

Having laid the foundation for implementing the Total Cost of Stewardship Framework by documenting the priorities that govern how collection-related decisions are made and determining the capacity and cost implications that accompany them, the next step is to gather and share the information that will be used to support informed decision-making in the moment and responsible stewardship into the future (see figure 5).

Informed, in-the-moment decision-making and responsible, forward-thinking stewardship require all stakeholders in a decision to understand the immediate and longer-term implications associated with it. These stakeholders include, but are not limited to, those identified in the determining stewardship capacity process described above. Also important is documenting and sharing any known or anticipated needs or challenges associated with description, conservation, digitization, and/or storage. These are especially important to identify and communicate when the various stakeholders are scattered across the organization.

Informed, in-the-moment decision-making and responsible, forward-thinking stewardship require all stakeholders in a decision to understand the immediate and longer-term implications associated with it.



The **Operational Impact Report Template** can be used to record and communicate, in a single document, basic information about a potential acquisition as well as information about the immediate and longer-term costs and capacity implications associated with making it available for use. A robust operational impact report can be helpful for sharing information with donors (about resources that are needed for, or have been committed to, stewarding their gift, for example) and when preparing grant applications, project proposals, and other requests for whatever additional resources may be required to effectively and responsibly steward a particular collection.

FIGURE 5. Gather and share information

MAKE DECISIONS TOGETHER

Informed decision-making around collections requires that everyone involved in the lifecycle of collection stewardship has a shared understanding of when and how various decisions are made, and by whom. It is vital to appropriately assign responsibility for gathering and capturing information about a potential acquisition both early in the decision-making process and across different moments in the course of its stewardship. This is especially true when knowledge about and responsibility for the different kinds of information you are gathering—assessing research value, preparing a processing plan, estimating storage requirements, and documenting known or anticipated physical, legal, intellectual, or other limitations on access—is distributed among various individuals across the organization. It is also important that requests or requirements—around conservation, digitization, or exhibition, for example—that may be difficult or expensive to fulfill are documented and communicated so they can be incorporated into a shared decision-making process. By understanding what information will be used in the decision-making process, who has that information, and how it relates with institutional priorities and capacities, information can be more easily gathered, shared, and consistently assessed (see figure 6).

Ensuring that information is exchanged when and as needed is typically easier said than done, especially in large organizations and over extended periods of time. Clarity around roles and responsibilities is essential, both at the highest level and for the potentially many decisions and workflows that may be embedded deeper in the organization.

By understanding what information will be used in the decision-making process, who has that information, and how it relates with institutional priorities and capacities, information can be more easily gathered, shared, and consistently assessed.



**Make Decisions
Together**

Three templates—one for a **Potential Acquisition Proposal**, another for a proposed or suggested **Processing Plan**, and a third for **Digitization Project Proposal**—provide structure for creating the documentation that is necessary for informed, shared decision-making around collections. The templates support an institution in a careful assessment of value and cost and allow them to be compared and considered together. Any or all of these templates can be used at any point in the stewardship life cycle to guide and inform collaborative decision-making. Considered together, modified to accommodate repository-specific needs, and communicated alongside an up-to-date Collection Development Policy and a robust, thoughtfully prepared Operational Impact Report, these documents provide the foundation for the Total Cost of Stewardship Framework for which we are advocating.

FIGURE 6. Make decisions together

CONCLUSION

All potential collection acquisitions are opportunities, but opportunities that come with a commitment to stewardship. Collection building choices in archives and special collections can impact how we understand the past and how our present will be understood in the future. But for our collections to have this impact, they must be visible and available for broad and equitable use. Archives and special collections must not only be collectors, but also active and engaged stewards of the collections we hold in trust for the public.

The Total Cost of Stewardship Framework allows confident assessment of opportunities, giving an institution knowledge that it can live up to these stewardship commitments. The framework is presented here within the context of special collections. But as the broader research library contends with the challenges of stewarding the evolving scholarly record and must care for collections that are complex and contextually situated, from nontraditional channels and without traditional publication instantiations, similar considerations will need to be made outside of special collections. By attending to the intersection of our collecting practice and our operational capacities to preserve and provide access to those collections, we can responsibly build and steward collections and better support our communities, colleagues, institutions, and researchers. The Total Cost of Stewardship Framework and accompanying tool suite presented here will support the holistic assessment and informed, responsible decision-making necessary to making our complex, rich, and evolving collections available to the publics we serve.

Archives and special collections must not only be collectors, but also active and engaged stewards of the collections we hold in trust for the public.

DEFINITIONS

The following is a list of the definitions used throughout this publication:

Annual Capacity for Stewardship: the amount of labor, supplies, and other resources an institution can devote to stewardship activities annually. It can be estimated using the Operational Impact Estimator.

Capacity Constraint: factors that limit production, performance, or output. In the Total Cost of Stewardship context, a capacity constraint impacts an institution's ability to accomplish collection management activities.

Collection Building: all of the activities that contribute to the creation of a body of collections, broadly. This includes acquiring collection material through transfer, donation, or purchase, and creating digital collections through digitization, web archiving, and other means.

Collection Management: all of the activities that are necessary to ensure that collection material is described, discoverable, and available for use. This includes accessioning and processing, cataloging, conservation, and digitization.

Opportunity Cost: the loss of potential gain from other alternatives when one alternative is chosen. In the Total Cost of Stewardship context, acquisition, resource allocation, and other decisions have potentially significant opportunity costs.

Responsible Stewardship: an institution's commitment to making informed, ethical, and transparent decisions about how to provide care for the collections entrusted to it. Responsible stewardship also assumes that a realistic assessment of institutional capacity is factored into every acquisition decision.

Total Cost of Stewardship: all of the costs associated with building, managing, and caring for collections so they can be used by and useful to the public.

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