

**Society of American Archivists  
Council Meeting  
November 18/19, 2024  
Chicago, IL – Hybrid**

Standards Committee and Technical Subcommittees:

Annual Report, 2023-2024

(Prepared by: Jodi Allison-Bunnell, outgoing co-chair)

**Membership**

Jodi Allison-Bunnell (Co-Chair)  
Lara Michels (Co-Chair)  
Alexis Antracoli  
Anna McCormick  
Daniel Michelson  
Heather Lember  
Susan Luftschein  
Wendy Pflug  
Lydia Tang, Council Liaison

*Ex Officio:*

Regine Heberlein (TS-DACS Co-Chair)  
Maristella Feustle (TS-DACS Co-Chair)  
Karin Bredenberg (TS-EAS Co-Chair)  
(TS-EAS Co-Chair)  
Dara Baker (TS-GRD Chair)  
Elizabeth Russell (TS-GRD Co-Chair)  
Susanne Annand (TS-AFG Co-Chair)  
David Owens (TS-AFG Co-Chair)  
Stephanie Luke (Rep to ICA-EGAD)  
Sharry Watson (Rep from CCA CCAD)  
Rebecca Wiederhold (Rep to ALA Cmte on Cataloging: Description & Access and MARC  
Advisory Cmte)

**COMPLETED PROJECTS AND ACTIVITIES**

**Governance**

The Standards Committee met monthly throughout the year and held a meeting in advance of the Annual Meeting via Zoom (July 2024). See Appendix A: Standards Committee Meeting Minutes, 2023-2024.

## Technical Subcommittees and Task Forces

### TS-GRD

### TS-DACS

- At the February meeting of the SAA Council, TS-DACS requested changes to the Standing Rules regarding the size and composition of TS-DACS, which were [approved](#). The purpose of the updates was to bring the list of ex officio members of TS-DACS in line with actual practice and expand the size of the subcommittee to be commensurate with the scope of its responsibilities.
- In December 2023, the International Council on Archives released the suite of Records in Contexts (RiC), which supersedes ISAD-G, ISAAR-CPF, ISDIAH, and ISDF. Since those standards have been foundational to DACS, TS-DACS had been following the development of RiC closely and [responded to open calls for comments](#). As [reported by the senior co-chair of TS-DACS Greg Wiedeman last year](#), the feedback submitted was neither incorporated nor responded to. For those reasons, TS-DACS responded to the release of RiC with a [statement](#), subsequently published on the SAA website, asking for a delay in adopting RiC until the pending fourth part, the Application Guidelines, are published and the community has had the opportunity to weigh the impact of the change on current practice and tools as well as its added value to user services. TS-DACS also expressed its concern over adopting a standard developed outside the collaborative and inclusive norms of SAA and in apparent disregard of the stated needs of its members.
- TS-DACS Education Lead Donnelly Walton created a new educational video to introduce practitioners to DACS Part II (archival authorities). A [draft](#) of the instructional video is complete and will be published at the beginning of the 2024-25 term.
- TS-DACS held its first-ever virtual community meeting on three half-days from April 15-17. The purpose of the meeting was to get community input on the potential impact of a further alignment of the Principles with the Rules and practitioners' needs for guidance. After long deliberations, TS-DACS opted for a virtual format to allow as many interested stakeholders as possible to participate, especially including colleagues with limited travel funding or limitations on travel due to family obligations or health concerns as well as colleagues more comfortable in a virtual setting. The meeting was conducted using guided exercises that culminated in participants commenting on existing tickets regarding Principles alignment work in progress as well as creating additional tickets reflecting their needs and questions. The event gave TS-DACS lots of input to consider as it charts a path forward, including the possibility—raised by meeting participants—that the Principles themselves may be due for revision. A brief synopsis of the event was published in [Descriptive Notes](#) and the meeting materials used during the community meeting may be found in the [TS-DACS Google Drive](#).

**TS-EAS**

- The EAC-CPF team (led by Elia) has continued the maintenance work with EAC-CPF. The group has focused on the Best Practice Guide for EAC-CPF 2.0 and the work that is going on with the EAD revision. The team also drafted a minor revision of the EAC-CPF version 2 tag library, which was updated after approval from the Standards Committee.
- The EAD team (led by Arnold) drafted a minor revision of the EAD3 tag library, which was approved by the Standards Committee and published at the same time as the EAC-CPF revision. The group continues the work with a major revision for EAD (EAD 4.0). In August, the team held a 2.5 day in-person meeting in Washington DC to facilitate discussions and work with the new version. These meetings were funded by the participants' own institutions with a room provided by SAA at the conference hotel. Online participation was also provided by one of the co-chairs. During the spring of 2024 the team released a draft for comments on the new version of EAD. The team has with the aid of the Outreach team hosted and provided recordings to several webinars on the subject of the new version of EAD throughout the year. The series of webinars had different starting times with one focused on the North Americas and South Americas, one focused on Oceania and Asia and one focused on Europe and Africa. This flexible schedule ensured that attendance during working hours were possible, thus making the goal of encouraging and engaging with participants from countries across the world possible. The whole series showed an attendance of approximately 40 persons for each webinar with a spread over the continents the focus of the webinar aimed for. The team also engaged with different aggregators in both US and worldwide to inform about the on-going revision. Currently, most of the EAD team's work is focused on the major revision process, specifically handling the community comments collected during the call for comments. The team is also engaged in meetings around SAA 2024.
- The Schema team (led by Custer) supported the EAC-CPF and EAD teams with schema updates. The team has worked with the draft version of EAD and provided draft schemas as well as Schematron rules for a more refined validation. The Best Practice Guide has been set up in GitHub by the Schema Team and is being populated with content from the EAC-CPF and EAD teams. The Schema team is also responsible for the Tag Libraries set up and transformation into different formats and work has been done to enhance the transformation process and to make sure reuse of the shared elements is possible.
- The Functions team (led by Bredenberg) has continued its work and has created a White Paper followed by a number of examples to drive the discussion of the proposed format to its next level and released this on a call for comments to the community to get its first users feedback. This proposed format will be the third part needed for starting the work to facilitate Records in Context (RiC) alignment of the EAS formats.
- Last, the Documentation and Outreach team (led by Nimer), continued to assist the entire TS-EAS Committee with outreach efforts. This team also planned, transcribed, and released a number of webinars focused on the EAD revision. The team also aided with setting up an introductory webinar to EAD aimed at Asia with participants from China,

South Korea and Japan aiding with translations. All of which are now hosted on SAA's Youtube account <https://www.youtube.com/@SocietyofAmericanArchivists/videos> .

### **TS-AFG**

- No report has been received as of this writing, but the committee is aware that the group is completing chapters in the facilities guidelines. We expect that this group will need to be re-appointed in order to complete its charge.

### **Liaisons**

The committee continues to use liaisons to SAA component groups for such purposes as calls for comments on draft standards, staying connected to groups that maintain standards, and bringing questions to co-chairs' attention.

### **Endorsements and comments**

The committee invested considerable time in responding to the release of Records in Context Part 3. See below for further details.

### **Standards development and revision**

- Approved minor change requests from TS-EAS and TS-DACS.
- Advanced extension of TS-AFG group members' terms; approved by Council.
- Re-start of ARM BIBFRAME group, a joint SAA, RBMS, and ARLIS venture.
- TS-DACS made major progress on updating the standard, with a well attended and structured online meeting in April.
- Promoted review of the Accessioning Best Practices.
- Approved proposal that the RAO Section be the maintainer of *Guidelines for Primary Source Literacy* and the *Standardized Statistical Measures for Public Services* and passed to Council.
- Approved proposals from the RAO Section to revise the Guidelines for Primary Source Literacy and passed to Council.
- Approved revision of Guidelines for Accessible Archives standard and passed to Council.
- Began looking at the SAA strategic agenda and chose the standards roadmap as the next thing to develop, beginning with the annual meeting in July.

### **ONGOING PROJECTS AND ACTIVITIES**

#### ***Procedures for Review and Approval of as SAA-Developed Standard Revision/De-Mystifying the Revision Process***

- Procedures for Review and Approval of an SAA Standard thoroughly revised and updated
- Consultation with Diversity Committee and Accessibility & Disability Roundtable on how to ensure diverse perspectives that are consistent with the SAA strategic plan. As part of this work, had an internal discussion of how we talk about diversity in standards.
- Offered groups more structured guidance on complete communications and transparent feedback that still ensures that groups can determine the best approaches for their community and beyond.

- Created a “least you need to know” and brief visual representation of the process to help groups understand the process at a broad level.

***Standards Portal/Managing Maintenance***

- We were unable to update the Standards Portal this year. SAA staff kindly made some updates for us, but lack of access to the portal continues to be an issue.

**INITIATIVES ASSOCIATED WITH THE 2020–2022 STRATEGIC PLAN**

***Goal 2: Enhancing Professional Growth***

Developing and maintaining standards is both an ongoing process and one that supports professional growth continuously.

***Goal 3: Advancing the Field***

Advanced statements to SAA Council on Records in Context, which were approved and posted to the SAA website. The statements explained that because of the lack of communication to date from ICA/EGAD, the SAA Standards apparatus is unable to adopt RiC at this time. However, we are aware of the new standard and look forward to adopting it once the implementation guidelines are available and able to be digested. As a follow up, we met with SAA leadership to ask that they initiate conversation with their ICA counterparts. There has been no response from ICA at this point. We appreciate the work that SAA leadership and staff have exercised in this area, including President Smith’s exploration of alternate structures through the Hui.

***Goal 4: Meeting Members' Needs***

Planning for improved management and sustainability of existing standards and the Standards Portal reflects our committee’s commitment to facilitating communication among members of new and revised standards (4.1).

We advocated (without success) for SAA funding for updating the Accessible Archives Standard from the SAA Foundation.

We responded to TS-EAS request to connect with the Diversity Committee to understand how best to advance diversity-focused processes in an international group.

**QUESTIONS AND CONCERNS FOR COUNCIL ATTENTION**

The co-chairs spent more time than they would like trying to get email lists updated, trying to update SAA CMS web pages, and trying to work with SAA’s Zoom account. We have moved most of our infrastructure to a Google site and have had to use a members’ Zoom account in order not to waste considerable time on administrative trivia.

The council is already aware of the need for financial support for Standards activities. A major source of frustration this year has been scheduling and getting support for the 2-day TS-EAS meeting in Chicago prior to the Annual Meeting. The TS did everything they were asked to do, on the requested schedule, but without the needed results. We are grateful for the eleventh-hour action to pass a special funding request, to extend both invitation letters and a discounted rate for the TS members who were unable to register without those letters, and for a meeting facility and lunches. However, the delays and lack of responsiveness prior to those events caused the co-chairs of TS-EAS a great deal of stress.

The profession needs knowledgeable, accomplished professionals to engage with the work rather than to waste their time. Administrative support from SAA needs to improve to recruit and retain a viable volunteer-based standards apparatus.

**Appendix A: Meeting Minutes**

All meeting minutes are posted at <https://www2.archivists.org/groups/standards-committee>

**Appendix B: Technical Subcommittee reports**

TS-EAS: [https://drive.google.com/file/d/1Td00tMYrUV\\_3UYFr22IM-i7UPQXKf0nv/view?usp=share\\_link](https://drive.google.com/file/d/1Td00tMYrUV_3UYFr22IM-i7UPQXKf0nv/view?usp=share_link)

TS-DACS:

<https://docs.google.com/document/d/1QPN6sJTzQocKgSoxJqlQAe15UhpyX4FT1aNJjbVCnwQ/edit?usp=sharing>

TS-AFG: No report

TS-GRD: No report