

# Society of American Archivists

## Standards Committee Annual Report 2012–2013

### Membership

Cory Nimer (Co-Chair, 2010–2013)  
Lisa Miller (Co-Chair, 2012–2014)  
Bruce Ambacher (2010–2013)  
Heather Dean (2010–2013)  
Matthew Eidson (2011–2014)  
Kathleen Feeney (2010–2013)  
Rosemary Flynn (2011–2014)  
Dan Santamaria (2013–2015)  
Jeffrey Suchanek (2011–2014)  
Dennis Meissner, Council Liaison (2010–2013)

#### Ex Officio:

Marcy Flynn (Immediate Past Co-Chair)  
Michele Pacifico (TS-AFG Co-Chair)  
Tom Wilsted (TS-AFG Co-Chair)  
J. Gordon Daines (TS-DACS Chair)  
Anila Angjeli (TS-EAC-CPF Co-Chair)  
Katherine Wisser (TS-EAC-CPF Co-Chair)  
Michael Rush (TS-EAD Co-Chair)  
William Stocking (TS-EAD Co-Chair)  
Laura Jackson (TS-GRD Chair)  
Terry Catapano (SDT Chair)  
Cory Nimer (Rep to CC:DA)  
Daniel Pitti (Rep to ICA-EGAD, formerly ICA-CBPS)  
Claire Sibille-de Grimouard (Rep from ICA-EGAD, formerly ICA CBPS)  
Sharry Watson (Rep from CAA CCAD)  
Vacant (Rep to ARMA)  
Vacant (Rep to MAC, formerly ALA-MARBI)  
Vacant (Rep to AIIM)  
Vacant (Rep to NISO)

#### Incoming members for 2013–2016 term:

Kathryn Bowers  
Beth Davis-Brown  
Trevor Thornton  
Meg Tuomala

#### Incoming chair for 2013–2015 term:

Dan Santamaria

## COMPLETED PROJECTS/ACTIVITIES

### Governance

#### Revisions to standards maintenance procedures

Following Council adoption of the second edition of *Describing Archives: A Content Standard* (DACS), it was made available in print and electronic formats. With the flexibility provided by electronic publication, the Technical Subcommittee for DACS (TS-DACS) proposed that its charge be changed to allow them to update the standard on an ongoing basis. The proposal seemed reasonable to the Committee, but required a revision of existing procedures. The Committee reviewed its procedures and, in July 2013, proposed to Council a series of changes to enable ongoing review and update. The changes will be reviewed by Council at its August 2013 meeting.

If the revised procedures are adopted, technical subcommittees interested in changing their approved maintenance plan would need to propose changes in their charge for consideration by SAA Council. Contingent on Council approval of the revised procedures, the Committee also recommended some changes to the TS-DACS charge. They addressed the shift from cyclical to ongoing review, a rotating membership plan, and other matters. The Committee submitted this proposal to Council in July 2013; it will be reviewed by Council at its August 2013 meeting.

#### Representative appointments

In May 2013 the SAA Council asked the Standards Committee to review the six representations reporting to it. SC was tasked with assessing the ongoing utility of each representation, and for those not recommended for sunseting, create or revise the charge, establish end-of-term dates, and ensure that annual reports are submitted by all representatives each year. In response the SC recommended continuing five representations:

- Association of Records Managers and Administrators (ARMA) International;
- Committee on Cataloging: Description and Access (CC:DA);
- International Council on Archives Experts Group on Archival Description (ICA-EGAD) (formerly the ICA Committee on Best Practices and Standards, ICA-CBPS);
- MARC Advisory Committee (MAC; formerly the MARC Advisory Board)
- National Information Standards Organization (NISO)

The SC recommended sunseting one representation:

- Association of Information and Image Management (AIIM)

This set of recommendations will be reviewed by Council at its August 2013 meeting.

## Endorsements and comments

This year, the SC participated in document reviews, including the review and recommendation of (1) SAA-developed and external standards for action by SAA Council; (2) draft standards being developed by external groups seeking feedback and comments; and (3) the endorsement of annual meeting session proposals. A listing of documents reviewed is provided below.

### SAA Standards recommended for SAA Council endorsement

*Describing Archives: A Content Standard (DACs)*, second edition

<http://www2.archivists.org/standards/describing-archives-a-content-standard-second-edition-dacs>

In December 2012 the Technical Subcommittee for Describing Archives: A Content Standard submitted a second edition of *DACS* for SC review. The SC reviewed the final draft and recommended adoption to SAA Council in January 2013. Council adopted the standard on January 23, 2013.

### External documents recommended for SAA Council endorsement

*ACRL/RBMS Guidelines for Interlibrary and Exhibition Loan of Special Collections Materials*,

<http://www.ala.org/acrl/standards/specialcollections> (SC recommendation adopted by Council)

### External draft documents comments

Second Edition of *Graphic Materials: Rules for Describing Original Items and Historical Collections*

(DCRM(G)), <http://dcrmg.pbworks.com/w/page/6108102/FrontPage> (SC submitted compiled comments)

Minimum Digitization Capture Recommendations developed by the Preservation and Reformatting Section of the Association for Library Collections and Technical Services (ALCTS),

<http://www.ala.org/alcts/resources/preserv/minimum-digitization-capture-recommendations> (SC encouraged comments by individuals)

Program for Cooperative Cataloging (PCC) Relationship Designator Guidelines Task Group Report,

<http://www.loc.gov/aba/pcc/rda/RDA%20Task%20groups%20and%20charges/PCC-Relat-Desig-TG-report.rtf> (SC encouraged comments by individuals)

SC was informed that its comments on the ANSI/AIIM 25-201X "Assessing Trusted Systems for Compliance with Industry Standards and Best Practices," which were submitted in the previous reporting year, were the source of most of the revisions to the draft standard. The revised document is available at

[http://www.aiim.org/documents/standards/NSC/Trusted\\_System\\_Assessment\\_Edited\\_\(Comment\\_Approval\).pdf](http://www.aiim.org/documents/standards/NSC/Trusted_System_Assessment_Edited_(Comment_Approval).pdf).

## SAA annual meeting sessions endorsed

“It's a Con(text) Job: Contrasting EAC-CPF Projects” (Chair: Jerry Simmons) ACCEPTED

## ONGOING PROJECTS/ACTIVITIES

### Initiatives associated with the new 2013-2018 Strategic Plan

Current committee projects and activities are matched to desired outcomes identified in SAA's Strategic Plan 2013–2018, <http://www2.archivists.org/governance/strategic-plan/2013-2018>.

#### Goal 2: Enhancing Professional Growth

**Standards Portal:** Launched in 2011, the Portal at <http://www2.archivists.org/standards> is an electronic gateway to information on archival standards. This year the second edition of DACS was made freely available via the Portal, along with ISO 16363, which is offered without the ISO title page. Members continue to add content to the Portal. The SC worked with Brian Doyle to create guidelines for component groups on how to effectively use the Portal, which were added to the Drupal Manual. In addition, SC members were assigned roles as Portal representatives to other SAA component groups.

This aligns with 2.1, publication reflecting the latest thinking and best practices, 2.2, delivering information via accessible, affordable, and technologically timely methods, and 2.3, supporting the career development of members.

#### Goal 3: Advancing the Field

**Representative appointments:** The work concerning external representatives (see page 2) aligns with 3.3, participating actively in relevant partnerships and collaborations; it also supports 4.2, creating opportunities for members to participate in the association.

#### Goal 4: Meeting Members' Needs

**Standards Collaboration Listserv:** To improve communication between the Committee and liaisons from other SAA component groups, a Standards Collaboration listserv was created by Brian Doyle and used by SC for such purposes as calls for comments on standards.<sup>1</sup>

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<sup>1</sup> Section and Roundtable liaisons to SC are listed at <http://www2.archivists.org/groups/standards-committee/section-and-roundtable-liaisons-to-the-standards-committee>,

**Encouraging SC participation:** To improve communication among SC members, a teleconference was held in September 2012 to discuss current and future plans, and the Committee posted two standards on Google Docs, to which members could add comments that were shared with other members.

These align with 4.1, facilitating effective communication among members.

Respectfully Submitted,

Cory Nimer and Lisa Miller, Co-Chairs, 2012–2013

(Report prepared August-September 2013)

## List of Appendices

Schema Development Team report (Schema DRT)

Technical Subcommittee for Archival Facilities Guidelines report (TS-AFG)

Technical Subcommittee on *Describing Archives: A Content Standard* (TS-DACS)

Technical Subcommittee for Encoded Archival Context—Corporate bodies, Persons, and Families report (TS-EAC-CPF)

Technical Subcommittee for Encoded Archival Description (TS-EAD)

Technical Subcommittee on Guidelines for Reappraisal and Deaccessioning (TS-GRD)

ALA Committee on Cataloging: Description and Access representative report (CC:DA)

MARC Advisory Committee representative report (MAC)

International Council on Archives Experts Group on Archival Description representative report (ICA EGAD)

## Schema Development Team (Development and Review Team) Report, 2013 Society of American Archivists Annual Meeting

The Schema Development Team had an active year participating in the EAD schema revision process as well as the development of the Tag Library for EAC-CPF, making a great deal of progress on both fronts. The major milestones and areas of activity were:

### EAD Revision

- Held face-to-face meeting October 9-10, 2013 at the Institute for Advanced Technology in the Humanities, University of Virginia, Charlottesville, VA
- Established GitHub repository for open and distributed maintenance, development, and distribution of the EAD revision and its related tools.
  - o <https://github.com/SAA-SDT/EAD-Revision>
- Released Alpha version of revised EAD Schema on GitHub, February 2013
  - o <https://github.com/SAA-SDT/EAD-Revision/releases/tag/v.0.1.1-alpha>
- Participated in analysis of comments on Alpha Schema and discussions within TS-EAD regarding features of the Revision.
- Adopted the Issue Tracker feature of GitHub repository to manage feature requests, bug reports, etc... Resolved over 200 issues to date:
  - o <https://github.com/SAA-SDT/EAD-Revision/issues>
- Released Beta Version of Schema on GitHub, August 2, 2013
  - o <https://github.com/SAA-SDT/EAD-Revision/releases/tag/v0.2.1-beta>

### EAC-CPF Tag Library

- Established GitHub Repository for for open and distributed maintenance, development, and distribution of the Tag Library and code used to generate it .
  - o <https://github.com/SAA-SDT/eac-cpf-taglibrary>
- Created Text Encoding Initiative XML based model for encoding of the Tag Library. This model will allow for centralized maintenance of the text of the Tag Library, including translations to multiple languages.
- Developed preliminary conversion stylesheets to produce PDF and HTML versions of Tag Library; for HTML, see:

- o [http://htmlpreview.github.io/?https://github.com/SAA-SDT/eac-cpf-taglibrary/blob/4253814d34ac0f1e1a6b3ea8ef86cbbad0b03fcf/html\\_output/cpfTagLibrary.html](http://htmlpreview.github.io/?https://github.com/SAA-SDT/eac-cpf-taglibrary/blob/4253814d34ac0f1e1a6b3ea8ef86cbbad0b03fcf/html_output/cpfTagLibrary.html)

- The approach and code developed for the EAC-CPF Tag Library will be applied to the EAD Tag Library as well.

## Schema Development Team (Development and Review Team)

### Members

- Terry Catapano (Columbia University) Chair
- Karin Bredenberg (National Archives of Sweden)
- Florence Clavaud (Ecole nationale des chartes)
- Michele Combs (Syracuse University)
- Mark Matienzo (Yale University Library)
- Daniel Pitti (University of Virginia)
- Salvatore Vassallo (University of Pavia)
- Michael Rush (Yale University Library) Ex Officio (TS-EAD co-chair)
- William Stockting (British Library) Ex Officio (TS-EAD co-chair)
- Anila Angjeli (Bibliothèque Nationale de France) Ex Officio (TS-EAC-CPF co-chair)
- Katherine Wisser (Simmons College) Ex Officio (TS-EAC-CPF co-chair)
- Lisa Miller (Hoover Institution Archives, Stanford University) Ex Officio (Standards Committee co-chair)
- Cory Nimer (Brigham Young University) Ex Officio (Standards Committee Co-Chair)
- Dennis Meissner (Minnesota Historical Society) Council Liaison

## Society of American Archivists

### Technical Subcommittee on Archival Facilities Guidelines (TS-AFG)

#### Annual Report to the SAA Standards Committee

July 15, 2013

##### Annual Report of the TS-AFG: September 2012 to August 2013

###### Current status:

The subcommittee will not be meeting in New Orleans. Instead, the TS-AFG has plans to meet in Washington, DC on August 26-27. We continue to work towards a joint US-Canadian standard.

Tom and Michele are in the process of developing a meeting agenda and a list of issues to consider for a revised standard. Topics include:

- Affect of LEED building requirements – environmental controls, lighting, architecture, materials and finishes.
- Lowering the environmental impact of archival buildings.
- Updated standards (NFPA, ASHRAE) that apply to archival facilities and their impact on current standard. US standards. Canadian standards.
- New developments in temperature and humidity standards.
- Special needs/changes for building in tropical climates.
- Introduction of new technologies – LED lighting, X-Tend High Bay Mobile Shelving, etc.
- Impact of electronic records and digitization on archival buildings. (Do we need a specialist on the subcommittee for this topic?)
- Improved handicap accessibility in archival buildings. (SAA Accessibility Working Group specifically requested that the SAA standard on archival facilities address accessibility issues.)
- New research and publications affecting archival buildings.

At the upcoming meeting, we hope to have agreement on the following:

- What are the strengths and weaknesses of the current guidelines?
- What are the overall changes that are needed to update the guidelines? What changes are realistic?
- Who will take responsibility for writing/re-writing specific section/s?
- Whether we need to add any additional members to the task force to bring specific skill-sets?
- Timeline for completing the initial draft? How do we manage project if we do not get funding for meetings?
- Consultation/review with national and international colleagues?

At a minimum, we hope to be able to deliver both an English-version print and an on-line edition of the updated guidelines. If we can secure funding, we also hope to release the guidelines in Spanish and French.

During this past year there have been some informal discussions among subcommittee members on current research, new technologies, and issues that were not addressed in the first edition of the

facilities standard. The subcommittee has kept a record of these email discussions and of publications, bibliographies, and new research papers on facilities topics.

Funding:

In order to move forward with a revised standard, the TS-AFG requires funding to support meetings of the subcommittee and for the costs of the updated standard that is to be published in English, Spanish and French. In May/June 2012, Canadian archival and preservation programs went thru severe cutbacks and our Canadian representative on the subcommittee, Iona McCraith, lost her job and our project lost its funding from the CCA (Canadian Council on Archives) for Iona's travel and for a French translation of the joint standard. We went in search of other funding.

On our behalf, SAA wrote a letter of inquiry to the Delmas Foundation. On May 16, 2013, SAA received notice from the Delmas Foundation that we would not be considered for a grant. SAA also requested additional funding from Spacesaver but there is no word regarding that funding.

The TS-AFG has some funding leftover from its original Spacesaver grant. The subcommittee plans to use this money to hold a meeting in Washington, DC on August 26-27, 2013. In the meantime we will continue to seek funding for the project.

Outreach:

Our Canadian representative, Iona McCraith, is now employed with the AAO (Archives Association of Ontario) and will continue to be our liaison with the CCA and other Canadian archival institutions.

Diane Vogt-O'Connor presented a paper on the SAA Facilities Standard at the IFLA (International Federation of Library Associations) conference in Helsinki in August 2012. It was well received and she received many favorable comments and expressions of interest of cooperation. Diane has prepared a list of international contacts that are particularly interested in being involved in the revised standard, either as participants or reviewers.

Michele Pacifico made preliminary inquiries to the ICA (International Council of Archives) about collaboration, but held back on further discussion until we have a better sense of our goals and budget.

We will discuss how best to approach this kind of collaboration and outreach at our next meeting.

Respectfully submitted,  
Michele F. Pacifico and Thomas Wilsted  
Co-Chairs, SAA Technical Subcommittee on Archival Facilities Guidelines

# Technical Subcommittee on *Describing Archives: A Content Standard* (TS-DACS) Annual Report

Submitted July 2013

The Technical Subcommittee on *Describing Archives: A Content Standard* (TS-DACS) has had another busy year. TS-DACS is responsible for overseeing the timely and ongoing intellectual and technical maintenance and development of *Describing Archives: A Content Standard* (DACS). This report covers the period August 2012-July 2013.

TS-DACS spent the last year reviewing comments on the draft version of *Describing Archives: A Content Standard* and finalizing the second edition of the standard. The second edition of DACS was released in May 2013. It is available through the SAA bookstore and as a free download from the TS-DACS website (<http://www2.archivists.org/groups/technical-subcommittee-on-describing-archives-a-content-standard-dacs>). The subcommittee also began the process of creating a website for DACS.

The subcommittee has also proposed placing DACS on a continuous revision cycle and has submitted proposed changes to the TS-DACS charge and membership terms to the Standards Committee.

## TS-DACS Membership

### Service, 2010-2015

J. Gordon Daines III (Brigham Young University), chair

Hillel Arnold (New York University)

Kathryn Bowers (Harvard University Archives)

Chatham Ewing

Jacqueline Dean (University of North Carolina, Chapel Hill)

Mary Lacy (Library of Congress)

Sibyl Schaefer (Rockefeller Archive Center)

Claudia Thompson (University of Wyoming)

### Ex Officio Members

Lisa Miller (Standards Committee co-chair)

Cory Nimer (Standards Committee co-chair)

## Revision of *Describing Archives: A Content Standard*

At the annual meeting in San Diego in August 2012, TS-DACS met to begin evaluating the feedback received from the archival community the draft revision of *Describing Archives: A Content Standard* (DACS). The in-person meeting was used to review the feedback received on Parts I, II, and the appendices of revision draft that had been received by the annual meeting. Feedback continued through mid-September 2012. Gordon Daines compiled all of the feedback on the proposed revision and submitted it to TS-DACS for review and comment via email. A subset of TS-DACS met in October 2012 in Chicago to finalize the draft. The finalized draft was submitted to the Standards Committee in December 2012 and ratified by SAA Council in January 2013. TS-DACS spent the first part of 2013 working with the SAA publications office to finalize DACS and to prepare the second edition. The second edition was released as a freely downloadable PDF in May 2013 and was available for purchase in the SAA bookstore beginning in June 2013.

## Meeting Minutes

### August 2012

#### TS-DACS meeting Minutes

San Diego, CA

8 August 2012

Attending: Claudia Thompson, Mary Lacy, Gordon Daines, Jackie Dean, Kate Bowers, Chatham Ewing, Hillel Arnold, Sibyl Schaefer, Cory Nimer, Marcy Flynn, several visitors

- I. Revision draft discussion
  - a. Part I
    - i. Talked about multiple single dates and the request to provide guidance—no conclusion
    - ii. Talked about the request for more examples—additional examples will be left for the website
    - iii. Talked about the term “undated”—consensus was to leave the rule as is.
    - iv. 7.1.8 What about historical accident that impacts collections? Chatham Ewing will provide an example.
  - b. Part II
    - i. Look at the EAC website for potential examples
    - ii. Also look at SNAC for examples from NARA

- iii. Need to clarify what triggers an archival authority record. Cory Nimer will provide this text.
    - iv. Add additional information on variant names. Cory Nimer will provide this text.
  - c. Appendices/crosswalk
    - i. Question was raised about where to link in the appendices. To the standard itself or to the page about the standard that links to the standard. The decision was to provide both links.
    - ii. Mary will work on creating the following crosswalks for the text:
      1. To Dublin Core
      2. To MODS
      3. To MARC
      4. To EAD
      5. To EAC
      6. To RDA
      7. To ISAD (G)
      8. To ISAAR (CPF)
    - iii. Crosswalks for the following will go to the website
      1. DCRM (G)
      2. DCRM (Mss)
  - d. Examples
    - i. Comments will drive where we need to add additional examples.
- II. Next steps
  - a. Comments are due by September 15<sup>th</sup>
  - b. Gordon will consolidate the comments and send them out to the committee by September 28<sup>th</sup>.
  - c. A subset of TS-DACS will meet in Chicago either October 26-27<sup>th</sup> or November 2-3<sup>rd</sup>. The subset will include representatives from Part I, Part II, and Appendices/Crosswalks/Examples.
  - d. Revision will be submitted to Standards by middle of December 2012
  - e. Council will review the revision at their January 2013 meeting.
- III. Best Practices/Examples site
  - a. This will be the work of the committee once the revision is approved.

## October 2011

I thought today's meeting was very productive. I've attached the revisions document with my notes on what next steps are. The plan for the subgroup meeting is: 1. Authority record section, 2. Introduction, and 3. Redraft revision. Let me know if you have any comments or questions.

<p>2.3. Title Element. Purpose and Scope, p. 19</p> <p><b>Preface</b></p>	<p>I continue to be troubled by your decision to change <i>supplied</i> to <i>devised</i>, but if you're going to do that I think it is a huge cop out for you not to explain why, right here. It can be a footnote, but you absolutely must explain why you think it is important enough to reverse precedent set in ISAD(G) and nearly a decade of DACS education by changing this terminology in DACS 2013. The fact that you didn't explain it here makes me think you don't have a solid</p>
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	<p>explanation, in which case I think you need to revisit your decision.</p>
<p>2.3.19</p> <p><b>Suggest terms that could be used/Local processing manual (set standard and document)</b></p> <p><b>Records</b></p> <p><b>Collection</b></p> <p><b>Personal archive</b></p> <p><b>Family archive</b></p>	<p>I actually think you've managed to water this rule down to the point where it is meaningless. I fully support, and think it is time, doing away with the papers/records/collection distinction from APPM/DACS 2004 and replacing it with a single term. I'd vote for the term records, modified when meaningful by adjectives like personal, business, financial. By adding the sentence "However, other terms are acceptable to describe an archival unit," you're essentially saying that there's just no need for this part of the content standard. I emphatically disagree, and I think you're going in absolutely the wrong direction here. We should be taking the end-user meaningfulness that we know is papers/records/collections and doing something constructive about it, not just saying, essentially, "anything goes."</p>
<p>2.4 Date Element</p> <p><b>Look at dates in terms of general guidance</b></p>	<p>DACS should provide guidance on how to state a range of single dates.</p> <p>It is unclear in DACS whether providing a range of dates followed by the word "undated" (for one or more undated portions of the unit described) is acceptable. Guidance would be helpful.</p>
<p>2.4.4</p>	<p>Perhaps a newer example is called for? See <a href="http://arc.library.wisc.edu/cgi-bin/Pwebrecon.cgi?BBID=33151">http://arc.library.wisc.edu/cgi-bin/Pwebrecon.cgi?BBID=33151</a> from WHS: "October 24, 1788 (typescript copy, circa 1932)"</p>
<p>2.4.5</p>	<p>Record the year(s) in Western-style Arabic numerals. If the date found in or on the unit being described is not of the Gregorian or Julian calendar, record the date as found and follow it with the year(s) of the Gregorian or Julian calendar in parentheses. Specify the name of the calendar, such as Republican, Jewish, Chinese, in a note (see 7.1.2)</p> <p>2628 (1968)</p> <p>Note: Dated in accordance with the Chinese calendar.</p>

	<p>an 14 (i.e., 1805)</p> <p>Note: Dated in accordance with the French Republican calendar.”</p> <p>Comment: Why the inconsistent treatment of dates? Why not normalize all dates, and then present the date as it appears on the item in a note, if considered important, as we do?</p> <p>Suggested rewording:</p> <p>“Record the year(s) in Western-style Arabic numerals. If the date found in or on the unit being described is not of the Gregorian or Julian calendar, record the date as found in a note, specifying the name of the calendar, such as Republican, Jewish, Chinese, in a note (see 7.1.2)”</p>
<p>2.6.3</p> <p><b>Fix</b></p>	<p>This rule does not really say the source of the information which would be from the collection itself, accession paperwork, or outside sources. Really doesn't make sense to bunt to the devised title rules</p>
<p>2.6.6</p> <p><b>Conscious Decision</b> <b>(Document why)</b></p>	<p>I think you've copied the former Chapter 11 rules here, but one thing needs to be taken into account. Chapter 11 in DACS 2004 was explicitly about creating Name of Creator(s) in authority systems, but now that you've moved these into Part I that is no longer an assumption. You're decision to include a textual label as part of the data content for this element is, I think, ill advised. You seem to be doing it because you've copied this rule over verbatim from Chapter 11 without analyzing whether or not it is still relevant. I don't really think it is. I also think you wouldn't need this encoding here if you retained a few examples of element-specific encoding at the end of each chapter.</p>
<p>2.6.7</p> <p><b>Fix</b></p>	<p>example confusing; does not seem to follow format of other examples here</p>
<p>3.1</p> <p><b>Put on list for next revision</b></p>	<p>notably, there are no examples of a scope and content statement for a collection that consists solely of digital files. Should there be, so as to give guidelines on what sort of information should be included here, and what should be deferred to the Technical Access (or other) section(s)?</p>
<p>4.5</p> <p><b>Add this as a rule</b></p>	<p>If DACS is format neutral, why is Languages and Scripts of the Material (4.5) a required element? What if you catalogue something that has no language content, such as a pure graphic? Do you have to supply a note saying: “No language content”?</p>

Part II, chapter 9	I think one of the challenges in creating an archival authority systems is developing procedures for deciding what names warrant the effort of detailed records. Many repositories will probably want to create detailed records for lesser-known names within their areas of specialization, while avoiding duplication of effort for names that are already well-documented in standard reference sources and biographies. One way that DACS could offer some guidance would be to use a lesser-known name, rather than Humphrey, as an example of an added value record. I think Humphrey would be a good example for using the “Related Archival Materials and Other Resources” element to point to existing biographical information. The commentary on this element should allow citations to printed sources in both electronic and print-based authority files.
9 Authority Records	If the archivist is to record a name in the authority record in accordance with, e.g., RDA or AACR2, what should be done when those standards conflict with the instructions in DACS chapter 9? Or is only the authorized name – the heading, i.e., that will be used in access points – to conform with RDA, AACR2, or other standard, while additional elements included in the authority record should comply with chapter 9?  9.14: How is “period of activity” to be stated? The examples show only the dates.
9.5, p. 127	I'm not sure we should use "disambiguation" as the benchmark for providing fuller forms of names in the Authorized Form of Name. Disambiguation is very much a bibliographic authority construct. DACS 2004, in rule 12.18, gives archivists license to go beyond bibliographic traditions and rules in establishing authorized forms of names according to archival principles. Unless there's a good ISAAR(CPF)-based reason to change this and return to the bibliographic principle of disambiguation here, I think it is a mistake to do so. You really need to capture the spirit of rule 12.18 in DACS 2004 here, since that was one rule that was unique to archival content standards and did not come from AACR2.
9.13	Isn't it possible that the exact year is known but not the exact month and day is known? No examples show this and the rules make it seem like if I do not know the year month day then it should be recorded as approximate.
9.13	For persons, record their date of birth and/or date of death. Where exact dates are not known, record approximate dates. 1884 May 8 (date of birth) 1796? (date of birth) 1501 or 1507 (date of birth) 1826 July 4 (date of death) approximately 1945 January (date of death) 9.14. For persons, if both the date of birth or date of death are unknown, record floruit (period of activity) dates. If specific years of activity cannot be established, record the century or centuries in which the person was active.

	<p>1841-1874 12th century”</p> <p>Comment: I’m puzzled/troubled by the use of “exact dates” to mean exact day. Many of the sources available to a cataloger will give only a year of birth and/or death. These are not questionable or uncertain or approximate dates. Seems like this is setting an unrealistic standard for what sort of information will be available to a cataloger. Also: if your month or your day is probable, wouldn’t the question mark go after the questionable element, not after the year? And “active” or “flourished” should be the qualifier following active dates, no?</p> <p>Suggested rewording:</p> <p>“Record dates in [year] [month] [day] format. Indicate a probable date by adding a question mark If the date is uncertain but known to be one of two possibilities, record the date in the form [date] or [date] ● If the date can only be approximated, record the date in the form “approximately [date].</p>
9.13	<p>For persons, record their date of birth and/or date of death. Where the exact dates are not known, record approximate dates.</p> <p>1884 May 8 (date of birth) 1884 May (date of birth) 1884 (date of birth) 1884 May 8? (date of birth) 1884 May 8 or 9 (date of birth) 1796? (date of birth) 1501 or 1507 (date of birth) 1826 July 4 (date of death) approximately 1945 January (date of death)</p>
References to AACR2 should either be deleted or changed to “RDA or AACR2” <b>RDA or similar content standards</b>	
Requirements for Single-level Descriptions:	The Scope and Content element is included in single-level minimum but also (described as an <i>additional</i> element) in single-level optimum description.
Should companion standards be listed that are no longer available?	
p.145-146	Archival Authority Record: This needs to either be updated or deleted
page 126	it would probably be better to provide a more complete added value level of description

<p><b>Preface (?)/Punt (?)</b></p>	<p>, it would be helpful if definitions were provided for the different entities listed in this section either in the text, in a footnote, or in a glossary. I would recommend that the CNEDA entity definitions be adopted, which disallow the creation of headings for personas, bibliographic identities, and animals, but otherwise would not create significant divergence from library authority file structures. These are:</p> <p style="padding-left: 40px;">Person: "Individuo de la especie humana."</p> <p style="padding-left: 40px;">Family: "Dos o más personas relacionadas por matrimonio, nacimiento, adopción u otra situación jurídica similar, o bien por presentarse ellos mismos como una familia."</p> <p style="padding-left: 40px;">Corporate body: "Organización o grupo de personas identificado por un nombre propio y que actúa, o puede actuar, como una unidad, o bien un cargo institucional desempeñado por una persona."</p> <p>This definition of corporate body in particular is the same as is found in ISAAR(CPF), and similar to that found in ISAD(G), DACS, and RAD.</p>
<p>Paragraph on Examples (p. 5)</p>	<p>Paragraph on Examples (p. 5) will need to be rewritten if most MARC and EAD examples have been removed, and to clarify when they appear; it looks like these occur only when the rule indicates that information can be given in text or in a code. EAC-CPF examples should be mentioned here as well.</p>
	<p>If the archivist is to record a name in the authority record in accordance with, e.g., RDA or AACR2, what should be done when those standards conflict with the instructions in DACS chapter 9? Or is only the authorized name – the heading, i.e., that will be used in access points – to conform with RDA, AACR2, or other standard, while additional elements included in the authority record should comply with chapter 9?</p>
<p>1.1. Preamble parts</p>	<p>You may be waiting until you're farther along with this draft, but I hope TS-DACS will be updating the Preface, Acknowledgments, and Overview of Archival Description to make them specific to DACS 2013. I think it is important that you provide some grounding for why these changes were undertaken and address the scope of the revision as TS-DACS undertook it, especially at a broad level the things you chose not to address in this revision.</p>
<p>1.2. Encoding examples at the end of each chapter in Part I.</p>	<p>I think it is a mistake to remove these. I know that you're moving fully encoded examples to the Standards Portal, which is a great thing. Nonetheless, removing element-specific examples of encoding in EAD and USMARC here forces people who don't really know those structure standards to wade through fully encoded examples elsewhere. I think element-specific examples serve a useful purpose at the end of each Part I chapter and that</p>

	they should be updated and retained.
	Generally, I think the presentation of Chapter 9 needs some work. The number of rules is exhausting, and most archivists will have no referent for understanding this atomized view of the data content of an archival authority record. Is there any way to group them meaningfully and perhaps provide encoded examples of that chunk or grouping of rules? I'd hate to see the importance of finally having an ISAAR-based data content standard for archival authority data lost because of off-putting presentation.
p. 4  <b>Clarify this rule</b>	I think you're making a big mistake lumping the AACR-specified use of square brackets in with abbreviations and acronyms. Many, many archivists are and will continue to be confused by the very specific bibliographic usage of square brackets to indicate information not found on the chief source of information. I think in this introduction, since you've chosen to introduce square brackets, you need to explicitly mention that you mean square brackets as regular punctuation, like parentheses, and not the specific instance of square brackets as used by bibliographic catalogers to indicate that information did not come from the chief source of information. As one strategy, you could do this with a footnote referencing rule 2.3.3. In my comment on this page, I indicated a hopefulness that you'd address this distinction elsewhere, but you don't. I think you have to, given that DACS continues to be an educational as well as a standards document for the U.S. archival community. Also, see my comment on rule 2.4.16. DACS actually does explicitly provide some standards for usage of abbreviations!
2.2. Chapter 1. Levels of Description, p. 7	In your new introductory sentences, I think you need to footnote the discussion of levels in sections 1 and 2 of ISAD(G) to remind DACS users of the broader context of this discussion of levels in archival description.
Introduction to Describing Creators, pages 104-107  <b>Revised</b>	I think you have to be really consistent in describing and cross-referencing what you've done with former chapters 9 & 10. This will likely be the most confusing thing about DACS 2013, so the more hand-holding and referencing you do in your text, the better off DACS users will be in their transition from 2004 to 2013.
Table C3, p. 225-226	You'll redo the crosswalk between ISAAR(CPF) AND DACS 2013, right? And perhaps add in a crosswalk to EAD-CPF? And some of the other DACS 2004 crosswalks where the DACS numbering has changed in DACS 2013?
<b>Preface/Introduction</b>  <b>What is required in</b>	New discovery systems are likely to pull data both from descriptions and from records for corporate bodies, persons, and families. DACS could be more explicit about which parts of the standard are intended for descriptions of collections and

<p><b>collection descriptions?</b> <b>What is required in authority records?</b></p>	<p>which pertain to records for persons, corporate bodies, and families.</p> <p>We are unclear as to the need for two separate sections on creating biographical and administrative histories. Regardless of having a formalized archival authority file or not, much of the descriptive content is the same in both the authority record and in the bio/admin narrative. Would it not make more sense to users to have one section on archival authority control and specify which pieces of the authority file should be used to generate the narrative found in the finding aid (since that is where we are going anyway)? This would make it easier for people to adopt EAC-CPF since pieces of the description could better map to the standard.</p> <p>What is the role now for biographical and historical notes in collection descriptions? Are the references in Part I to Part II legacies of the old structure of DACS, or are they intended to indicate that collection descriptions rules are the same as rules for descriptions of corporations, persons, and families?</p>
<p><b>Preface/Explanation</b></p>	<p><i>What is the role now for biographical and historical notes in collection descriptions? Are the references in Part I to Part II legacies of the old structure of DACS, or are they intended to indicate that collection descriptions rules are the same as rules for descriptions of corporations, persons, and families?</i></p>
	<p>Are 2.7.8 and 2.7.9 giving guidance for both EAD and EAC in the same place? The solution may be one note in a finding aid, but the same data may exist in two separate entity records.</p>

**Minimal/Optimal for Authority records and collection descriptions?**

**Subgroup meeting October 2012**

**Try to have packet together by Dec. 1**

**Other issues**

- Small glossary v. embedded in text
- Encoding examples—full examples in the appendices
- *Guide to DACS*
- List of changes to DACS—available on the web/in the first printing (appendix) (What's New in DACS?)

**Comment [JGD1]:** Claudia will take the first crack at this.

**Comment [JGD2]:** Gordon

**Preface issues**

- ICA conceptual model
- Explain why 2.6 and 2.7 are in Part I
  - 2.7 is keyed to the collection; this is different Part II
- Relationships (especially in 2.7 How does the creator relate to the materials?)—Hillel
- Need address changes in DACS
  - Removed encoding examples
  - Moved chapters 9 and 10
  - Reworked section II
  - Changed supplied to devised and explain why
  - Removed part III
  - Minor modifications in part I
  - Note about abbreviations, acronymns, and square brackets
  - RDA and the convergence of LAM
  - EAC-CPF Part II
  - Papers issue
  - Analog and digital materials are covered by the rules
  - Cory's definitions
  - Website relationship to examples
  - Things we didn't change and why

## Chapter 9

- Part II
  - Chapter 9 Introduction/Relationships/LCNAF v. Archival Authority Records—Hillel
  - Chapter 10 Form of Name 9.5 to 9.11
  - Chapter 11 Description of Corporations, Persons, and Families 9.12-9.30
  - Chapter 12 Related Corporations, Person, and Families 9.31-9.35
  - Chapter 13 Archival Records Management 9.36-9.47
  - Chapter 14 Related archival materials and other resources 9.48-9.52
  - At top of each sub-groups indicated what is required/also identify at the item level
- When do you create authority records?
  - Discuss in the preface to this section—not addressing; institutions set local practice and document; no community consensus as of yet
- LCNAF v EAC (CPF)
  - Form of the name needs to match, does the rest of the record need to match?

Comment [JGD3]: Hillel

Comment [JGD4]: Jackie

## Crosswalks

- EAD/MARC/DACS
- ISAAR/EAC/DACS
- RDA/DACS

Comment [JGD5]: For print version, Mary

## March 2013

### Meeting Minutes

#### TS-DACS

6 March 6, 2013

1. TS-DACS membership
  - a. Gordon proposed that membership on TS-DACS be moved to staggered terms. Currently everyone on TS-DACS rotates off in 2015. This could make continuity on the committee problematic. Committee members were in general support with this motion. Hillel Arnold and Jackie Dean volunteered to extend their terms of service.
2. DACS revision cycle
  - a. A motion is before SAA Council to put DACS on a rolling revision cycle. Dennis Meissner reported that feedback during Council's discussion phase has been positive and that he is confident that the motion will pass. This will necessitate updating the TS-DACS charge.
3. Update on publication of DACS revision
  - a. Gordon has received the copyedited version of DACS back from SAA. He will review the suggested changes and contact committee members if needed. Committee discussed whether there were any deadlines to attach to the publication schedule. Committee would like to see the pdf version online available by June 6<sup>th</sup> and the print version available by the SAA annual meeting in New Orleans.
4. Educational Outreach
  - a. Workshops
    - i. Hillel and Jackie are working on revising the introductory DACS workshop. It will be offered at SAA 2013 in New Orleans. Looking to develop a suite of workshops (online and in person) around the introductory workshop. Cory Nimer is working on revising the MARC according to DACS workshop.
  - b. Implementing DACS publication
5. Development of website plan of attack
  - a. Talked about how to approach the development of the website for additional examples. Also talked about turning DACS into a website. The committee would like to see the DACS website and the examples website be the same. Need to figure out a way to delineate the content approved by SAA Council (DACs standard) and that vetted by TS-DACS (additional examples). A small subgroup will work with Matt Black at SAA to figure out what can be done in Drupal. That subgroup will consist of Gordon Daines, Kate Bowers, Sibyl Schaefer, and Hillel Arnold.
  - b. Talked about the need to gather additional examples. Email requests have not been terribly effective. Will make a form available online to gather examples. Each TS-DACS members should also look to gather examples. Kate mentioned that she has used ArchiveGrid to look for examples. Gordon suggested that good examples from each committee members' home institution would be worth gathering. It was mentioned that we should identify where the examples are coming from.
6. **Action Items**
  - a. Gordon will update the TS-DACS charge with changes to committee membership and the revision cycle

- b. Gordon will flesh out a proposal for staggered membership on TS-DACS. Will probably ask a couple of members to end their terms in 2014 and a couple to extend to 2016.
- c. Hillel will share a draft outline of the introductory DACS workshop with the committee for feedback.
- d. Gordon will arrange a teleconference with Matt Black ([mblack@archivists.org](mailto:mblack@archivists.org)) in April for the website subgroup.
- e. TS-DACS members will look for additional examples to illustrate DACS rules.

## Proposed Charge and Procedures Manual

**Reports to:** Standards Committee

**Established:** August 14, 2010

### I. Purpose

The Technical Subcommittee for *Describing Archives: A Content Standard* (TS-DACS) of the SAA Standards Committee is responsible for overseeing the timely and ongoing intellectual and technical maintenance and development of *Describing Archives: A Content Standard* (DACS). DACS is an output-neutral set of rules for describing archives, personal papers, and manuscript collections, and can be applied to all material types. DACS is compatible with ISAD(G): General International Standard Archival Description, 2nd ed. (International Congress on Archives, 1999). DACS is an SAA-approved standard; documentation for DACS is available through the Society of American Archivists at <http://www.archivists.org/governance/standards/dacs.asp>.

### II. Committee Selection, Size, and Length of Term

TS-DACS consists of seven members (including one chair) appointed by the SAA vice president / president-elect for staggered three-year terms so that a minimum of two individuals are appointed by the Vice President each year. The technical subcommittee shall have no less than five members who are members of SAA. All members shall demonstrate significant knowledge of and experience with archival description generally, and with DACS specifically.

All members of TS-DACS shall be recommended by the Standards Committee for appointment by the SAA Vice President. The chair will be selected from existing TS-DACS membership and appointed for a three year term. The chair and members of TS-DACS may be reappointed for one consecutive term.

*Ex officio* members of the Technical Subcommittee for DACS shall include the following if they are not regular members of the subcommittee:

- Chair of the Standards Committee (or an appointed representative);
- Chair of the Description Section;
- Society of American Archivists' representative to Committee on Cataloging: Description and Access (CC:DA);
- Society of American Archivists' representative to ALCTS / LITA Metadata Standards Committee;
- Society of American Archivists' representative to International Council on Archives Subcommittee on Archival Description.

### III. Reporting Procedures

The chair of the Technical Subcommittee for DACS shall report at least annually to the chair(s) of the SAA Standards Committee on the occasion of the SAA annual meeting. If extramural funding is obtained by SAA, the chair shall provide all necessary narrative reports to the SAA office in order that the reporting requirements of SAA and the funding source are met.

#### **IV. Duties and Responsibilities**

To fulfill this mission, TS-DACS is specifically charged to:

- Carry out a review of *Describing Archives: A Content Standard* as needed
- Promote the understanding and use of DACS by the American archival community.
- Support educational efforts related to DACS by SAA.
- Develop members of the archives profession who are capable of promoting and maintaining DACS over time.
- Communicate its activities to relevant SAA components.
- Foster communication between other entities developing standards related to DACS.
- Work to ensure that DACS is compatible with other national and international descriptive standards.

The TS-DACS procedures manual outlines how these responsibilities are accomplished.

#### **VI. Meetings**

TS-DACS shall carry out its charge primarily via electronic mail, regular mail, and conference calls. It shall meet at the SAA annual meeting and as necessary with funding from SAA or from extramural sources (with prior approval by the SAA Council).

*Approved by the SAA Council: ? 2013*

## **TS-DACS Procedures Manual**

This procedures manual governs the activities of the Technical Subcommittee on *Describing Archives: A Content Standard* (TS-DACS). It covers the management of the review and revision cycle of *Describing Archives: A Content Standard* (DACS), version control of revisions to DACS, and educational outreach activities.

### **Review and Revision**

Review and revision of *Describing Archives: A Content Standard* may be triggered in one of two ways:

1. TS-DACS has as its responsibility to monitor companion standards associated with DACS. These standards include (but are not limited to): Encoded Archival Description (EAD), Encoded Archival

Context (EAC), *Resource Description and Access* (RDA), MACHine-Readable Cataloging (MARC) standards, and the Descriptive Cataloging of Rare Materials (DCRM) suite of standards. A revision of any of these companion standards will trigger a review of DACS by TS-DACS for possible revision to maintain compatibility of standards. If revision is necessary, TS-DACS will gather community feedback and make appropriate revisions to be presented to the Standards Committee and SAA Council for approval.

2. A review and revision of components of DACS may be triggered by a formal proposal submitted to TS-DACS.
  - a. The proposal will include the following sections:
    - i. Brief description of the component of DACS to be changed as well as the proposed change.
    - ii. Justification for the proposed change. The justification must include why the proposed change to DACS is beneficial to the American archival profession.
    - iii. Impact of the proposed change.
  - b. Upon receipt of a change proposal, TS-DACS will evaluate the proposal and decide whether it merits further community discussion. If TS-DACS feels that the change proposal has merit, it will make the proposal available for community feedback in as many ways as possible.
  - c. TS-DACS will review the community feedback and make a decision about whether or not to revise DACS.
  - d. If revision is selected, TS-DACS will revise the corresponding component of DACS and make the revision available for community feedback.
  - e. TS-DACS will then review community feedback and solidify proposed revision. The finalized revision proposal will be submitted to the Standards Committee and then SAA Council for approval.

## **Version Control**

Each component of DACS will include a statement indicating versions. TS-DACS will also keep a master log indicating the revisions made to DACS. This master log will be available to the archival community through the TS-DACS page of the SAA website.

Previous versions of DACS and revised components will be maintained and made accessible to the archival community.

## **Educational Outreach**

TS-DACS is responsible for ensuring that the American archival community understands DACS and is able to implement it. They accomplish this responsibility by:

1. Working cooperatively with the SAA Education Office to develop continuing education trainings related to DACS (these include workshops, videos, etc.).

2. Using the Standards Portal to promulgate information about DACS and its implementation.
3. Partnering with the SAA Publications Office to produce publications that enable archivists to successfully implement DACS.

## Technical Subcommittee for Encoded Archival Context (TS-EAC)

### Report, 2013 Society of American Archivists Annual Meeting

The Technical Subcommittee for Encoded Archival Context is happy to report a busy and successful year of work focused on the process of editing and translating the Tag Library of EAC-CPF, disseminating the standard, and managing inquiries about the standard for the international community. The TS-EAC is also involved in the process of the revision of EAD and is particularly attentive to issues related to the reconciliation of both standards, EAD and EAC-CPF.

Following our meeting at last year's SAA Annual Meeting, TS-EAC had the following primary goals:

- Publishing an edited version of tag library and examples
- Submit proposal to fund meetings of TS-EAC to address encoded archival functions. This needs to be thought ahead so that funding comes through by the time the EAD revision is finished.
- Collect use cases to analyze for future development of the standard
- Eventually a joint taskforce should be appointed to develop a controlled vocabulary for types of relations. This is an opportunity to connect with approaches in other standards — RDF ontologies used to publish linked data, for example. The need to develop a vocabulary that is suited to archives, yet not isolated from other standards, should be taken into consideration.

#### EAC-CPF Tag Library

##### Tag Library editing

The Tag Library was thoroughly reviewed last year. The TS-EAC Editing Subcommittee completed a last round of editing by late 2012, and the finalized version was handed over to the SDT for encoding. The TS-EAC Editing Subcommittee also produced a document with highlighted changes, for distribution to the translators in other languages, in order to facilitate the update of the content of the translated version, and help them keep them compliant with the English version.

##### EAC-CPF Tag Library as a dynamic documentation

The SDT (Florence Clavaud) has done substantial work to finalize the encoding model that will enable the dynamic management of the Tag Library, with possibilities of versioning, and integration of the various existing and forthcoming translations. The model will serve for the encoding of both EAC-CPF, and EAD2014 Tag Libraries. TEI templates are made available by Florence in GitHub <<https://github.com/SAA-SDT/eac-cpf-taglibrary/tree/master/templates>> for the encoding of the EAD 2014 Tag Library.

The encoding of the content of the EAC-CPF Tag Library (the original English version) is completed by Karin Brendenberg, and made available at <<https://github.com/SAA-SDT/eac-cpf-taglibrary/tree/master/tei>>. Next step would be the encoding of the existing translations of the Tag

Library. The model was devised in such a way that the different communities responsible for the translations would be able to proceed themselves to the encoding effort of the translated versions.

The infrastructure for a dynamic management of the Tag Library will also be applied to the Tag Library of the revised EAD.

#### **EAC-CPF Tag Library translations**

In addition to the French version of the EAC-CPF Tag Library, online since May 2012, we are happy to report that substantial progress has been made in the dissemination of the standard through the translation of its Tag Library in different languages. Prestigious institutions are involved in that process. A new translation is thus published, and others are to be published soon:

- The Spanish version of the Tag Library was published in November 2012 by the *General Sub directorate of State Archives of the Spanish Ministry of Education, Culture and Sport*. The translation is published on the site of the State archives of Spain ([http://www.mcu.es/archivos/docs/EAC\\_CPF2010TL\\_SPA\\_2012.pdf](http://www.mcu.es/archivos/docs/EAC_CPF2010TL_SPA_2012.pdf)) and it is referenced in the Translations section of the EAC-CPF website.
- A Greek translation is underway by the *Ionian University. Database and Information Systems Research Group, Department of Archives and Library Science*. It has been recently reported by the Greek member of the TS-EAC that the translation is currently at its final stage.
- The German translation, by Kerstin Arnold, *Federal Archives of Germany and Archives Portal Europe project*, is at its final stage as well, and planned for release by August 2013
- The Italian translation, by *Istituto per i beni culturali della Regione Emilia-Romagna. Soprintendenza archivistica per l'Emilia Romagna*, is reported to be due in summer 2013.
- A Portuguese translation is also underway, chaired by Vitor Manoel Marques da Fonseca *Arquivo Nacional*, Brazil.

Comprehensive information about translations and institutions in charge of the translations in the respective countries is published on the EAC-CPF website <http://eac.staatsbibliothek-berlin.de/tag-library/translations.html>.

It is to be noted that the international community has committed to regularly update the translated versions of the Tag library and keep pace with the original English version changes.

#### **EAC-F**

The TS-EAC-CPF co-chairs have been in contact with the Standards Committee chairs and Council Liaison regarding initial work on the formation of a schema for the description of functions. A meeting is scheduled in Brussels, Belgium at the upcoming ICA meeting in November 2013 to discover the existing work on this from the European community. Results from this meeting will be reported to the Standards Committee and next steps considered.

## **EAC-CPF Use Cases**

### **JAO special issue on EAC-CPF planned**

Three years after the release of EAC-CPF, the moment has come to see that EAC-CPF has helped to broaden the scope of authority control and identity issues, and to increase awareness of the importance of contextual information. We notice that the standard is being increasingly used within the archival community; it also is being adopted by other communities in specific projects.

A special issue of JAO will be devoted to communicate about the use case studies that address the different perspectives from which the EAC-CPF is being used, including large-scale projects, thematic resources, administrative tools, and research services. Guest editors will be Anila Angjeli (BnF) and Katherine M. Wisser (Simmons College), co-chairs of TS-EAC. The guest editors are working with Tom Frusciano, editor of the journal, on a time table for the publication.

### **Relationship vocabulary development**

This remains an important initiative for the technical subcommittee and will be discussed at the meeting in August 2013 to see how we would like to move forward with this work.

## **Other Business**

### **EAC-CPF - a standard in use and thus in movement**

Translations of the Tag Library are excellent opportunities to test the accuracy and clarity of the documentation. As these initiatives are related to projects of implementation of EAC-CPF, the schema itself is also analyzed for consistency and accuracy. Since the last meeting of TS-EAC in August 2012, two other series of comments have been received, by APEx and by the Spanish translators.

The TS-EAC keeps track of any comment received and submits them for analysis and consideration to all its members. The TS-EAC Editing Subcommittee has committed to make any change (that does not have a direct impact on the schema) into the Tag Library, once the necessary infrastructure for this is on place. The purpose is to make the documentation as clear and comprehensive as possible. The translators will be consequently informed to reflect these changes in the other language translations.

Semantic, terminological and technical issues were pointed out. Some of them were resolved; others need more thorough consideration as they are related to both standards (EAC-CPF and EAD) and their interoperation. And so the issues pointed out during this process will also benefit to the revision of EAD and, when time comes, to the writing of the EAD tag library.

## **EAC-CPF and the revision of EAD**

The TS-EAC-CPF is actively involved in the revision process of EAD. Besides the fact that many of the TS-EAC-CPF members are also members of TS-EAD, the TS-EAC-CPF particular concern is in maintaining both schemas compatible.

**EAC-CPF website at <http://eac.staatsbibliothek-berlin.de>**

Since last year, Gerhard Müller from the *Staatsbibliothek zu Berlin* is acting as webmaster of the official EAC-CPF site. Any changes and updates asked for by the TS-EAC-CPF co-chairs were diligently made on the site.

Statistics from the website indicate that traffic on the website continues to hold steady between 500 and 1,000 unique visitors per month. In 2012, there were 14,776 visits to the site; in January-July 2013, 10, 146 visits to the site. However, it is to be noted that there is an increase (of more than 1,000 visits) compared to January-July 2012.

The TS-EAC has started to develop their microsite with SAA as well. The co-chairs will continue to work on populating this site with minutes from TS-EAC-CPF meetings from 2012 and 2013 and other relevant subcommittee documentation.

## **EAC-CPF examples group**

The examples group has been led by Jerry Simmons. He reports that the group has continued to work both on the examples in the tag library and EAC-CPF website as well as gathering new examples for the website. The analysis of the EAC-CPF use cases through diversified examples has led to the organization at the SAA 2013 of Session 510 - *It's a Con(text) Job: Contrasting EAC-CPF Projects*. The examples subcommittee will be meeting in New Orleans following the TS-EAC and TS-EAD meetings.

## **TS-EAC annual meeting 2013**

TS-EAC will hold a joint annual meeting with the Technical Subcommittee for Encoded Archival Description and the Schema Development Team on Wednesday, August 14th, 2013, from 8:00 AM to 12:00 PM, in New Orleans, Louisiana. The agenda for the TS-EAC portion of the meeting is as follows:

### **TS-EAC meeting agenda:**

1. Welcome and introductions, review of minutes and agenda
2. Revision issues of EAC-CPF
  - a. Revision suggestion submitted
  - b. Relationship to revision of EAD

3. Tag library update
  - a. Encoding of the tag library
  - b. Translations
  - c. Examples subcommittee report
  
4. Journal of Archival Organization
  - a. Special issue on EAC-CPF
  
5. Discussion on Relationship vocabulary development
  
6. EAC-F: discussion on launching work for a schema on functions
  
7. Project Updates
  - a. SNAC
  - b. APEnet
  - c. Others
    - i. EAC-CPF in France
    - ii. EAC-CPF in Germany
    - iii. EAC-CPF in Spain
    - iv. Other countries/projects
  
8. Goals for next year

Respectfully submitted by Katherine M. Wisser and Anila Angjeli, TS-EAC co-chairs, July 2013.

**TS-EAC Members:**

Anila Angjeli, Co-Chair (Bibliothèque Nationale de France)

Katherine Wisser, Co-Chair (Simmons College)

Kerstin Arnold (Bundesarchiv, Germany)

Erica Boudreau (John F. Kennedy Presidential Library and Museum)

Karin Bredenberg (National Archives of Sweden)

Basil Dewhurst (National Library of Australia)

Wendy Duff (University of Toronto, Canada)

Tammy Peters (Smithsonian Institution Archives)

Victoria Peters (University of Glasgow)

Chris Prom (University of Illinois, Urbana-Champaign)

Aaron Rubinstein (University of Massachusetts, Amherst)

Jerry Simmons (National Archives and Records Administration)

Stefano Vitali (State Archives of Florence, Italy)

Lina Bountouri, Ex Officio (Ionian University, Greece)

Terry Catapano, ex officio, Schema Development Team (Columbia University)

Marcy Flynn, ex officio, Standards Committee (Silver Image Management)

Dennis Meissner, Council Liaison (Minnesota Historical Society)

Gerhard Müller, ex officio, Webmaster (Staatsbibliothek zu Berlin, Germany)

Cory Nimer, ex officio, Standards Committee (Brigham Young University)

Daniel Pitti, ex officio, Schema Development Team (University of Virginia)

Michael Rush, ex officio, TS-EAD co-chair (Yale University Library)

Jennifer Schaffner, ex officio, OCLC Research (OCLC Research)

William Stocking, ex officio, TS-EAD co-chair (British Library, UK)

Salvatore Vassallo, ex officio, Schema Development Team (University of Pavia, Italy)

## **Technical Subcommittee for Encoded Archival Description (TS-EAD) Report, 2013 Society of American Archivists Annual Meeting**

The Technical Subcommittee for Encoded Archival Description is pleased to report a busy and successful year of work focused on the process of revising EAD.

After our meeting at last year's SAA Annual Meeting, TS-EAD had the following goals:

1. Share the progress report to the 2012 EAD Roundtable meeting via the SAA Standards Portal
2. Finish discussion of proposed revisions
3. Hold a meeting of the Schema Development Team in October 2012
4. Hold a meeting of the tag library editorial team in February 2013
5. Release the alpha, beta, and final versions of the revised EAD schema

TS-EAD posted the slides for the progress report delivered to the EAD Roundtable to the SAA Standards Portal soon after last year's annual meeting. Later in the year, at the request of the Standards Committee, all documentation relating to the EAD revision was moved from the Standards Portal to the TS-EAD site.

Between October and July, TS-EAD held seven conference calls to discuss the revision. With grant support from the National Endowment for the Humanities and the Nationaal Archief of the Netherlands, two face-to-face meetings were held. The Schema Development Team met at the University of Virginia in October and the tag library editorial team met at the OCLC Research offices in San Mateo, California in February.

During the fall it became clear that the previous revision timeline, which called for an alpha release early in the fall, a beta release over the winter, and a final release by the summer of 2013, was unrealistic given the amount of work to be done. The committee agreed on an updated revision timeline, which remains on schedule:

- February 2013: Alpha release of schema, open alpha comment period
- May 1, 2013: End of alpha comment period
- August 1, 2013: Beta release, open beta comment period
- August 2013: Present the beta at SAA 2013 EAD Roundtable Meeting
- October 1, 2013: End of beta comment period
- December 1, 2013: Deliver final schema and tag library to the SAA Standards Committee
- Winter 2014: Submit new version to SAA Council for adoption, publish after adoption.

The alpha version of the revised EAD schema, a very rough re-working of the existing EAD 2002 schema, was released in February. The alpha comment period garnered extensive and insightful feedback, which resulted in significant changes to the schema for the beta release. The beta, a completely re-written schema, was released on August 2<sup>nd</sup>. Some unresolved issues remain, but the majority of the open issues relating to the revision to date are addressed by the beta.

One notable decision from the past year, made during the Schema Development Team meeting, was to commit to using GitHub, a web-based service for software development projects, both to track the issues and comments relating to the revision and the revisions to the schema itself. The GitHub repository for the revision is available at <https://github.com/SAA-SDT/EAD-Revision>.

TS-EAD will hold a joint annual meeting with the Technical Subcommittee for Encoded Archival Context and the Schema Development Team on Wednesday, August 14th, 2013, from 8:00 AM to 12:00 PM, in the Windsor room of the Hilton New Orleans Riverside. The agenda for the TS-EAD portion of the meeting is as follows:

TS-EAD meeting agenda:

- Updates and reports
  - Revision: progress and timeline (Rush)
  - Schema Development Team (Catapano)
  - Tag Library Editorial Team (Shepherd)
  - Library of Congress EAD site report (Rush for Gardner in absentia)
- Discussion
  - What should we call it?
  - Loose ends
    - Relations
    - Geographic elements and attributes
    - Other
  - Post release activities
    - Workshop update
    - "What's new?" webinar
    - EAD Cookbook
    - Supplemental Schematrons?
- Any other business

Respectfully submitted by Michael Rush and Bill Stocking, TS-EAD co-chairs, August 2013.

TS-EAD Members:

Michael Rush, Co-Chair (Yale University)  
Bill Stocking, Co-Chair (British Library)  
Michael Fox (Minnesota Historical Society)  
Kris Kiesling (University of Minnesota)  
Angelika Menne-Haritz (Bundesarchiv)  
Kelcy Shepherd (University of Massachusetts Amherst)  
Claire Sibille-de Grimouard (Direction générale des patrimoines)  
Henny van Schie (Nationaal Archief / Bibliotheek)  
Bradley Westbrook (Lyrasis)  
Karin Bredenberg, ex officio, Schema Development Team (National Archives of Sweden)  
Terry Catapano, ex officio, Schema Development Team (Columbia University)  
Florence Clavaud, ex officio, Schema Development Team (Ecole nationale des chartes)  
Michele Combs, ex officio, Schema Development Team (Syracuse University)  
Mark Matienzo, ex officio, Schema Development Team (Yale University)  
Daniel Pitti, ex officio, Schema Development Team (University of Virginia)  
Salvatore Vassallo, ex officio, Schema Development Team (University of Pavia)  
Merrilee Proffitt, ex officio, OCLC Research (OCLC Research)  
Glenn Gardner, ex officio, Library of Congress (Library of Congress)  
Hillel Arnold, ex officio, EAD Roundtable (Rockefeller Archive Center)  
Mark Custer, ex officio, EAD Roundtable (Yale University)  
Lisa Miller, ex officio, Standards Committee (Stanford University)  
Cory Nimer, ex officio, Standards Committee (Brigham Young University)

Anila Angjeli, ex officio, TS-EAC (Bibliotheque Nationale de France)  
Katherine Wisser, ex officio, TS-EAC (Simmons College)

**Annual Report: Technical Sub-Committee on Guidelines for Reappraisal and Deaccessioning (TS-GRD)**

**August 2012-August 2013**

Members:

Laura Uglean Jackson (Chair)

Chela Weber (Committee Member)

Mark Shelstad (Committee Member)

Margery Sly (Committee Member)

Virginia Hunt (Ex Officio, Acquisitions & Appraisal Section)

Lisa Miller (Ex Officio, Standards Committee Co-Chair)

Cory Nimer (Ex Officio, Standards Committee Co-Chair)

Dennis Meissner (Council Liaison)

There is not much activity to report for the TS-GRD's first year. Because the Guidelines for Reappraisal and Deaccessioning were brand new (approved by Council in May 2012), the members did not see a need to solicit revisions or meet at this year's annual meeting. No unsolicited proposed changes or suggestions were received. The only change made to the Guidelines was that the word "draft" was deleted and replaced with "Approved by the SAA Council – May 2012".

*Submitted by Laura Uglean Jackson, August 9, 2013*

# **Society of American Archivists**

## **Representative to American Library Association (ALA)**

### **Committee on Cataloging: Description and Access (CC:DA)**

#### **Annual Report 2012-2013**

During the past year I was able to attend the meetings of CC:DA at the ALA Midwinter meetings in Seattle, Washington (January 26 and 28, 2013) and at ALA Annual in Chicago, Illinois (June 29 and July 1, 2013). The primary focus of CC:DA continues to be the ongoing review of *Resource Description and Access* (RDA), the newly adopted rules for describing materials in the library community. In preparation for the upcoming meetings of the Joint Steering Committee on the Revision of RDA (JSC), CC:DA reviewed and developed proposals relating to various aspects of descriptive practice. Those proposals and discussion papers that were completed have now been forwarded to the JSC for their action in Washington, D.C. in November 2013.

While some of the work undertaken does not necessarily affect archival descriptive practice, there are a number of proposals that may impact archivists and should be considered by SAA technical subcommittees seeking compatibility with library standards. Each of these is described below, with an additional list of CC:DA actions with lesser impact on archival description.

#### **Relationship Designators in RDA Appendix K**

One of the larger projects undertaken by CC:DA was the development of a proposal for an expanded list of relationship designators for linking creators. The current appendix in RDA included a short list of specific possible relationships to record. While terms could be added through the Fast Track process, this group developed a more comprehensive list that included generic terms as well. The version of this document approved following ALA Annual and submitted to the JSC is available on their website at <http://www.rda-jsc.org/docs/6JSC-ALA-25.pdf>.

The potential addition of these terms may affect planning and use of archival authorities standards used by archivists. In the newly approved version of DACS, these terms may be used in specifying relationships for DACS 12.3. In EAC-CPF, registered versions of the terms might also be used as an attribute of the <cpfRelation> element.<sup>2</sup>

#### **Machine-Actionable Data Elements in RDA**

Another area of discussion for CC:DA has been the review and reconceptualization of RDA elements with the goal of improving their use by automated systems. Much of the discussion has centered on the

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<sup>2</sup> The RDA community is developing metadata registries of approved vocabularies in the Open Metadata Registry, available at <http://rdvocab.info/> (accessed August 7, 2013).

Extent element, which in its current version presents some difficulties for computer manipulation. While CC:DA was not able to develop a specific proposal for changes in this case, a discussion paper has been forwarded to the JSC for their consideration and is available at <http://www.rda-jsc.org/docs/6JSC-ALA-Discussion-1.pdf>.

The work by CC:DA around the RDA Extent element is paralleled by modifications currently under consideration by the Technical Subcommittee on Encoded Archival Description. It is hoped that the solutions established by both communities will allow for mutual reuse of encoded extent information.

### **Alternate Corporate Identities**

While the archival and library communities may have differing opinions on the question of bibliographic identities, efforts by CC:DA to develop a proposal for rules for alternative corporate identities may be of interest to archivists. This includes scenarios where a corporate body such as a performing group makes a recording under a group alias (e.g., the London Philharmonic performing as the Philharmonic Promenade Orchestra), in which case RDA would potentially call for the creation of an additional authority record. A formal proposal was not forwarded to the JSC at this time, but will be discussed further in future meetings.

The question of bibliographic identities, as well as the limits of individual corporate entities, remains an area of discussion for the archival community, and may impact SAA reviews of developing models from the International Council on Archives Experts Group on Archival Description (ICA-EGAD).

### **Recording Statements of Responsibility and Performer/Technical Credits**

An topic of discussion that may be of interest to motion picture archivists was the development of a discussion paper on the RDA rules separating statements of responsibility (Chapter 2) from performer notes and artistic and/or technical credits (Chapter 7). While this division has historical roots, its application is somewhat arbitrary in light of RDA principles, leading some to question whether they should be recorded separately or together in the statement of responsibility. While various options were presented, no conclusions were reached and the task force will continue its work and report at a future meeting. Their report from ALA Annual is available at <http://alcts.ala.org/ccdablog/wp-content/uploads/2013/05/mla2013-1.pdf>.

### **Updates from Other Organizations**

As part of their meetings, CC:DA also receives a number of reports from other organizations and representatives, including the ALA Representative to the JSC, the Library of Congress, and ALA Publishing. Some points of interest to archivists from these reports include the following:

- The Library of Congress published a linked data model called BIBFRAME in November 2012, which is anticipated to replace the MARC format in coming years. The library is currently

coordinating an early experimenters group to test its use. More information is available at <http://www.loc.gov/marc/transition/news/bibframe-112312.html>.

- The Library of Congress has transitioned to RDA, and is now requiring that all submissions to the LC Authority File be RDA-compliant. In the spring of 2013, nearly 670,000 records were updated for RDA using automated processes.
- The Library of Congress has moved to an online-only publication model for all cataloging documentation. Future manuals will not be available in print, while all publications currently available from LC in print will be available as online PDF files. This documentation will be available at <http://www.loc.gov/aba/>.
- The JSC representative reported that a number of changes had been made in the November 2012 meetings based on CC:DA proposals. These included rule changes for recording affiliations in authority records and substantial revisions of the rules for establishing subordinated headings for corporate bodies, as well as discussions for changes in recording the names of places.
- The Subject Analysis Committee submitted a discussion paper for ALA to the JSC recommending that basic guidelines for developing subject headings be inserted into the placeholder chapters of RDA. Their paper is available at <http://www.rda-jsc.org/docs/6JSC-ALA-Discussion-2.pdf>.

## Other Issues

A number of other proposals and discussion items with lesser impact on archival practice were addressed at the CC:DA meetings. These included the following:

- A proposal on variant title as access point. This proposal was accepted by CC:DA and sent to the JSC for action (<http://www.rda-jsc.org/docs/6JSC-ALA-24.pdf>).
- A discussion paper on recording relationships between works in descriptive records. This paper was sent on to JSC for review (<http://www.rda-jsc.org/docs/6JSC-ALA-Discussion-3.pdf>).
- A proposal on access points for treaties. This proposal was accepted by CC:DA and sent to the JSC for action (<http://www.rda-jsc.org/docs/6JSC-ALA-23.pdf>).
- A proposal on color content. This proposal was accepted by CC:DA and sent to the JSC for action (<http://www.rda-jsc.org/docs/6JSC-ALA-26.pdf>).
- A proposal on the capitalization of hyphenated words and alignment with the Chicago Manual of Style, 16<sup>th</sup> edition. This proposal was accepted by CC:DA and sent to the JSC for action (<http://www.rda-jsc.org/docs/6JSC-ALA-22.pdf>).

## Ongoing Work

During the coming months in preparation for the JSC meetings in November, the committee will be reviewing and providing comments on proposals submitted from other constituencies. Among the proposals on the agenda for that meeting are proposals for rules changes for recording place names, dimensions of still images, and the RDF representation of RDA relationship designators. A full list of proposals is available at <http://www.rda-jsc.org/docs/2013-JSC-meeting-documents-table.pdf>.

Additionally, it has been suggested by the Technical Subcommittee on Describing Archives: A Content Standard (TS-DACS) that some review be undertaken to recommend changes to the RDA guidelines for creating headings for officials as subordinated access points. It is expected that an initial review will be undertaken based on the National Council on Archives *Rules for the Construction of Personal, Place and Corporate Names* (<http://www.nationalarchives.gov.uk/documents/information-management/naming-rules.pdf>). Any proposals developed by that group would be submitted to the SAA Representative to CC:DA for consideration by that group.

Respectfully submitted,

Cory Nimer, SAA Representative to CC:DA

# **Society of American Archivists Representative to the MARC Advisory Committee (MAC) Annual Report 2012-2013**

In order to ensure representation and to gather information about the work of the committee, during the past year I attended the meetings of MAC at the ALA Midwinter meetings in Seattle, Washington (January 26-27, 2013) and at ALA Annual in Chicago, Illinois (June 29-30, 2013). Among the most important events during this time period was the reorganization of the American Library Association's (ALA) Machine-Readable Bibliographic Information (MARBI) Committee, which had previously met with MAC and played a central role in their deliberations. This group was replaced by the Metadata Standards Committee, and separated from MAC as of the ALA Annual meetings. During the same meeting the MAC chair, Sally McCallum, noted that while the focus of the committee will remain on MARC maintenance, that it is expected that the committee will eventually be charged with maintenance of the developing BIBFRAME standard. These change potentially increase the impact of SAA's representation on the committee in coming years, and the importance of ongoing collaboration in the face of shifting standards.

During this year's meetings, however, there were few changes impacting archival descriptive practice. The exception may be a series of proposals initiated by the ALA Subject Analysis Committee (SAC) aimed at simplifying the application of genre/form terms in the MARC Bibliographic 655 field. Other proposals addressed in the meetings are listed at the bottom of this report.

## **Genre/Form Proposals**

During the past few years as the Library of Congress has worked to develop its Genre/Form Thesaurus (LCGFT), it has worked to simplify their application by removing qualifiers, subdivisions, and other elements that were common to earlier terms taken from the Library of Congress Subject Headings (e.g., "American poetry—20th century"). In doing so, SAC has looked for other places in the Bibliographic and Authorities formats to code this information. This work culminated in the following changes to the format:

- Field 385 defined in the Bibliographic and Authorities formats for recording Audience Characteristics
- Field 386 defined in the Bibliographic and Authorities formats (excluding personal, corporate body, and family authority records) for recording Creator/Contributor Group Categorizations of Works and Expressions
- Field 046 revised in the Bibliographic and Authorities formats and field 648 in the Bibliographic format for recording Chronological Categories and Dates of Works and Expressions.

An additional discussion paper was submitted at the ALA Annual meeting proposing the creation of Field 388 for recording Chronological Terms in the Authority Format for Works and Expressions, which will likely be discussed further at Midwinter 2014.

These changes will likely impact archival repositories that use Genre/Form terms in their catalogs or archival management systems. The transfer of such information to other portions of descriptive and authority records may also impact systems designers and archival standards (i.e., Encoded Archival Description).

### **Other Issues**

A number of other proposals and discussion papers with lesser impact on archival practice were addressed at the CC:DA meetings. These included the following:

- A proposal on identifying titles related to the entity represented in an authority record. This proposal was accepted by MARBI and fields 672 and 673 were defined in the Authorities format.
- A proposal on making the 250 field in the Bibliographic format. This proposal was accepted by MARBI, and the format documentation changed.
- A proposal on defining a new code for scores in the Bibliographic format. This proposal was accepted by MARBI.
- A proposal on accommodating authority records for a medium of performance vocabulary. This proposal was accepted by MARBI and fields 162, 462, 562, and 762 were defined in the Authorities format.
- A proposal on controlling series information in the Bibliographic format. This proposal was accepted by MARBI and subfield \$7 was defined for fields 80X-83X in the Bibliographic format.
- A proposal on defining qualifier information for standard identifiers. This proposal was accepted by MARBI and subfield \$q was defined for fields 015, 020, 024, and 027 in the Bibliographic format.
- A discussion paper on defining indicator values for field 588 in the Bibliographic format.
- A discussion paper on separating the type of related entity from the relationship designator in the Bibliographic format.
- A discussion paper on identifying records from national bibliographies in the Bibliographic format.

Respectfully submitted,

Cory Nimer, Standards Committee co-chair

## Representative to ICA Experts Group on Archival Description Report, 2013 Society of American Archivists Annual Meeting

In 2012, Daniel Pitti was appointed as the SAA representative to the International Council on Archives (ICA) Experts Group on Archival Description (EGAD). The EGAD is the partial successor to the ICA Committee on Best Practices and Standards (CBPS).

In the fall of 2012, the ICA Programme Commission (PCOM) appointed Daniel Pitti as the Chair of EGAD for the 2012-2016 term. During this term, the EGAD is charged with developing a conceptual model for archival description that integrates and reconciles the four existing ICA descriptive standards:

- ISAD(G): General International Standard Archival Description
- ISAAR(CPF): International Standard Archival Authority Records – Corporate Bodies, Persons, and Families
- ISDF: International Standard Description of Functions (ISDF)
- ISDIAH: International Standard Description of Institutions with Archival Holdings

The EGAD will build on more than twenty years of ICA standards development, national or project-based modeling work in the archival community, and the modeling work of allied professional communities. This work will have as its core objective developing a conceptual model that reflects an international professional consensus and that positions the archival community to take full advantage of opportunities presented by current and emerging communication technologies, including the opportunities to work cooperatively within and without the archival community in a shared quest to provide enhanced access to and understanding of the human record.

Late in 2012, the chair of EGAD in consultation with Vitor Manoel Marques da Fonseca (Arquivo Nacional (Brazil)) and Claire Sibille-de Grimoüard (Service interministériel des Archives de France (France)), and with the approval of ICA PCOM appointed the executive and corresponding members of EGAD. (The list of members is appended at the end of the report).

The EGAD will meet face-to-face four times over the course of the appointed term. The first meeting is schedule adjacent to the first annual conference of ICA in Brussels in November 2013.

In preparation for this meeting, the EGAD has focused initial discussions on defining the domain and functional objectives (for the archival community and the users of archival resources) for the conceptual model. As soon as preliminary have good working drafts defining domain and objectives, attention will shift to analyzing three national archival conceptual models: *Australian Government Recordkeeping Metadata Standard Version 2.0* (2008: National Archives of Australia (AGRkMS)); *Modelo Conceptual de Descripción Archivística y Requisitos de Datos Básicos de las Descripciones de Documentos de Archivo, Agentes y Funciones* (2012: Comisión de Normas Españolas de Descripción Archivística (CNEDA)); and the *Finnish Conceptual Model for Archival Description* (2013: Arkistolaitos (National Archives of Finland)). In addition, the EGAD will also analyze the models developed in the LOCAH project in the U.K. and the model developed for the software ICA AtoM by Artefactual Systems.

In the summer of 2013, Gretchen Gueguen, Vitor Fonseca, Daniel Pitti, and Claire Sibille co-authored "Towards an International Conceptual Model for Archival Description," which describes the history of the ICA descriptive standards, current and emerging communication technologies, conceptual modeling of description in allied professional communities (in particular library and museum models), national and project-based archival conceptual models, and finally the overall plan of work for the EGAD. The paper has been translated into French, with translations into Portuguese and Arabic underway. While a Brazilian journal will publish the Portuguese translation, publishing venues and plans for the other versions have not yet been determined.

Over the course of the development, the EGAD will consult widely with the international archival community and related professional organisations, including the SAA Standards Committee. As milestones in development are reached, the EGAD will disseminate drafts of the model and documentation and gather community input. The EGAD will endeavour to ensure that the resulting international standard reflects a community-wide consensus and that it can be applied in all cultures, languages and scripts.

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### **Members of EGAD**

Nils Brübach, Sächsisches Staatsarchiv | Saxon State Archives (Germany)

Florence Clavaud (corresponding), Archives nationales (France)

Adrian Cunningham (corresponding), Queensland State Archives (Australia)

Bärbel Förster, Federal Department of Foreign Affairs (Switzerland)

Michael Fox (corresponding), Minnesota Historical Society (retired) (U.S.)

Beatriz Franco Espiño, Subd. Gral. De Archivos Estatales (Spain)

Pete Johnston (corresponding), Cambridge University Library (U.K.)

Jaana Kilkki (corresponding), National Archives (Finland)

Padré Lydie Gnessougou Baroan-Dioumency, Directeur de la Documentation et des Archives (Ivory Coast)

Gavan McCarthy, University of Melbourne eScholarship Research Centre (Australia)

Vitor Manoel Marques da Fonseca, Arquivo Nacional (Brazil)

Katherine (Kat) Timms (corresponding), Bibliothèque et Archives Canada | Library and Archives Canada

Victoria Peters, Andersonian Library, University of Strathclyde (Scotland)

Daniel Pitti (Chair/Président), Institute for Advanced Technology in the Humanities, University of Virginia (U.S.)

Bogdan-Florin Popovici, Arhivele Naționale ale României (Romania)

Aaron Rubinstein (corresponding), W.E.B. Du Bois Library, University of Massachusetts Amherst (U.S.)

Claire Sibille, Archives nationales (France)

William Stocking, British Library (U.K.)

Martin Stuerzlinger (corresponding), ARCHIVERSUM (Austria)

Salvatore Vassallo (corresponding), Archivum Romanum Societatis Iesu (Rome, Italy)

Stefano Vitali (corresponding), Soprintendenza Archivistica per l'Emilia Romagna (Italy)