Society of American Archivists
Council Meeting
Chicago, IL

Standards Committee: Annual Report
Prepared by: Lara Michels, Co-Chair

Year: 2024 - 2025

Current Membership Roster:

- Daniel Michelson, Co-chair, 2024-08-15 – 2026-09-01
- Heather Lember, Co-chair, 2025-07-15 – 2028-09-15
- Alexis Antracoli, Committee Member, 2023-07-17 – 2026-09-01
- Anna Björnsson, Committee Member, 2023-07-15 – 2026-09-01
- Peter Botticelli, Committee Member, 2025-07-15 – 2028-09-01
- Jennifer Brcka, Committee Member, 2025-03-19 – 2027-09-01
- Jennifer Gathings, Committee Member   2024-08-15 – 2027-09-01
- Regine Heberlein, Committee Member, 2025-03-21 – 2027-09-01
- Heather Lember, Committee Member, 2022-07-29 – 2025-09-01
- Susan Luftschein, Committee Member20, 22-07-29 – 2025-09-01
- Alexis Bohlander, Early-Career Member, 2025-07-15 – 2026-09-01
- John Shamgochian, Early-Career Member, 2025-07-15 – 2026-09-01
- Kelli Bogan, Ex Officio and Co-Chair, TS-DACS, 2024-08-15 – 2027-09-01
- Karin Bredenberg, Ex Officio and TS-EAS Co-Chair, 2016-08-06 – 2027-09-01
- Maristella Feustle, Ex Officio and Co-Chair, TS-DACS, 2024-08-15 – 2025-09-01
- Lara Michels, Ex Officio and Immediate Past Chair, 2025-08-15 – 2026-09-01
- Elizabeth Russell, Ex Officio, 2024-08-15 – 2025-09-01
- Mary Samouelian, Ex Officio and Co-Chair TS-EAS, 2024-08-15 – 2025-09-01
- Sharry Watson, Ex Officio and Rep from CAA-CCAD
- Rebecca Wiederhold, Ex Officio and ALA Cmte on Cataloging: Description & Access and MARC Advisory Cmte, 2023-07-01 – 2025-09-01
- Lydia Tang, Council Liaison, 2022-07-15 – 2025-09-01

PROJECTS AND ACTIVITIES

<u>Completed:</u>

Governance

The Standards Committee met monthly throughout the year and held a meeting in advance of the Annual Meeting via Zoom (July 2025). See Appendix A: Standards Committee Meeting Minutes, 2024-2025.

Technical Subcommittees and Task Forces

TS-GRD
- During the past year, the Technical Subcommittee on Guidelines for Reappraisal and Deaccessioning continued to revise the Guidelines for Reappraisal and Deaccessioning. Work sessions generally occurred monthly. The subcommittee settled on an appropriate scope this year and determined that the current guidelines provide clear and reasonable guidance on reappraisal and deaccessioning. The focus of the current revision is to restructure the guidelines, making clear that deaccessioning is not the only outcome of reappraisal. By doing this, the revised document will speak to more recent developments in the field such as discussions of iterative processing and reparative description.
- The members of the TS are committed to bringing this revision to conclusion and establishing a more sustainable method for long-term maintenance of the standard. To accomplish this, the team requested a one-year extension of the charge, which was granted by SAA Council. The current timeline is to finish the revision draft by late winter or early spring of 2026, so that the guidelines document can make its way through the SAA approval process later next year.

TS-DACS
- The Technical Subcommittee on Describing Archives: A Content Standard held its annual business meeting virtually on July 29th and concluded with an open forum discussing the future direction of DACS.
- Recently, TS-DACS welcomed new and returning members to the 2025-2026 term. The subcommittee remains two members shy of its full membership and leadership is hoping for two midterm appointees to fill that gap.
- For much of the year, operating with a smaller membership than usual, the subcommittee focused on publishing the latest educational video, addressing outstanding issues in GitHub, advancing the Principles alignment project where possible, and clarifying its position on Records in Context (RiC).
- The TS-DACS Education Lead, Donnelly Walton, developed a new educational video to introduce practitioners to DACS Part II, which focuses on archival authorities. The video was finalized and published at the beginning of the 2024–2025 term.(https://youtu.be/0fZXjyhDFtU?feature=shared).

- TS-DACS continued its open maintenance of DACS on GitHub, merging two community-submitted change requests into the standard: a bug fix addressing an extraneous space character (PR #99) and an updated example in section 6.2.3 (PR #28). Additionally, an Issue Tracker within the GitHub repository was developed to improve transparency and facilitate more effective tracking of issues and pull requests throughout the editorial process. There is one outstanding pull request; however, the committee has determined that it requires an additional example change and should be incorporated into the broader example-related work currently underway.
- TS-DACS is also continuing to work on updating DACS to better align with the revised Statement of Principles. Co-Chair, Maristella Feustle, initiated a comprehensive review of all examples in DACS, focusing on the initial assessment of clarity, consistency, and alignment with current descriptive practice to improve the usability of examples, reduce "information overload," and account for technological changes since DACS was first introduced in 2004.
- Both with regard to examples and on a more comprehensive level, Maristella continued to advocate for the expanded implementation of DACS Part II, as well as improved linkages between DACS Parts I and II in order to match the integrated approach to description set forth in Principle 4.
- TS-DACS, in consultation with TS-EAS, has decided not to pursue the incorporation of Records in Contexts (RiC) into DACS at this time, opting instead to monitor the development of the standard and reassess as it evolves.

TS-EAS
- TS-EAS took part in SAA's early-career member program this year and was happy to see that the 2024-2025 early career member applied to become a member of TS-EAS for the year 2026.
- The subcommittee made a change to its revision cycles. All EAS standards (EAD, EAC-CPF, and EAC-F) will henceforth follow the same revision cycle, with major revisions for all of them every fifth year.
- The EAC-CPF team has continued the maintenance work with EAC-CPF with a focus on the alignment needed for all EAS standards.
- The EAD team continues working on a major revision for EAD (EAD 4.0). In August 2024, the team held a 2.5 day in-person meeting in Chicago to facilitate discussions and review. Throughout the year, the team collaborated with the Outreach team to publicize the major revision and to encourage community engagement. They hosted and provided recordings to several webinars on the subject of the new version of EAD.
- The Schema team has supported the EAC-CPF and EAD teams with schema updates. The team worked with the draft version of EAC-CPF, EAD and EAC-F and provided draft schemas as well as Schematron rules for a more refined validation. The Best Practices Guide was set up in GitHub by the Schema Team and is being populated with content from the EAC-CPF, EAC-F 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 has continued its work and had a positive response on the call for comments on the published White Paper followed by a number of examples. The positive response meant that the team was able to move forward in creating the new EAS standard for describing functions.
- The Documentation and Outreach team assisted TS-EAS with its outreach efforts by planning, transcribing, promoting, and releasing 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 received as of this writing. The Standards Committee did receive an update at its annual meeting that TS-AFG has completed a draft of the revised standard and is nearly ready to send it out for review and comment. It should come to Standards for approval in the coming months.

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.

Standards Development and Revision

12 items sent to SAA Council for approval

- Approved minor change requests from TS-DACS
- Advanced to SAA Council the *National Best Practices for Archival Accessioning Working Group for the Archival Accessioning Best Practices* and advanced to SAA Council for approval (11/24)
- Advanced to SAA Council the Technical Subcommittee on Encoded Archival Standards' proposal to secure funding to support the annual hybrid meeting of the group (11/24)
- Advanced to SAA Council a *Request for Council Approval of Revised Version of the Guidelines for Accessible Archives for People with Disabilities, Extension of Revision Cycle from 3 to 5 Years, and Assignment of Responsibility for Guidelines to SAA's Accessibility and Disability Section* (11/24)
- Advanced to SAA Council a *Request for Council Approval for the Appointment of SAA's Reference, Access and Outreach Section as Group Responsible for the Guidelines for Primary Source Literacy and Standardized Statistical Measures and Metrics for Public Services in Archival Repositories and Special Collections Libraries* (11/24)
- Advanced to SAA Council a *Request for Council Approval for the Revision Proposal of the Guidelines for Primary Source Literacy* (11/24)
- Advanced to SAA Council a *Request for Extension of the TS-AFG Charge and Roster* (11/24)
- Advanced to SAA Council a *Request for Council Approval of Assignment of* Advanced to SAA *Council a Request for Revision of the Technical Subcommittee on Archival Facilities Guidelines (TS-AFG) Charge* (11/24)
- Advanced to SAA Council a *Request for Council Approval of Assignment of Responsibility for the Guidelines for Standardized Holdings Counts and Measures for Archival Repositories and Special Collections Libraries to SAA's Collection Management Section* (5/25)
- *Responsibility for the Best Practices for Volunteers in Archives to SAA's Archives Management Section* (8/25)
- Advanced to SAA Council a *Request for Council Approval of the Revised Archival Continuing Education Guidelines* (8/25)
- Advanced to SAA Council a *Request for Council Approval of the Principles in Indigenous Archival Repatriation (PINAR)* (8/25)

Ongoing:

Improving Process for Submitting Proposals to Standards
- During 2023-2024, the Procedures for Review and Approval of an SAA Standard were thoroughly revised and updated
- During 2024-2025, we continued to make improvements in the process of submitting proposals to the Standards Committee by eliminating the web-form on the Standards Portal and replacing it with a Google Form that is easier for the Standards Committee to manage and maintain.
- The Standards Committee co-chairs will continue to work to improve process around standards for SAA members

Standards Portal/Managing Maintenance
- As in 2023-2024, we were mostly unable to update the Standards Portal. SAA staff kindly made some updates for us, but lack of access to the portal continues to be an issue. We identified a possible solution at the end of the term and will investigate at the start of the new term.

Clarify and Better Document Status and Roles/Responsibilities for all Standards
- In 2024-2025, the co-chairs worked on the following practical, house-keeping matters:
  - Documenting our knowledge of the current status of various standards, liaison assignments, and lots of other operational details that make Standards work possible.
  - Ensuring that orphan standards were assigned a responsible group. This sometimes meant reaching out and suggesting that a group take on management of a specific standard.
  - Ensuring that the Standards Committee and the Technical Subcommittees had the number of members specified in the by-laws.
  - Ensuring that rosters were correct and up to date.
  - The Standards co-chairs will continue to focus on house-keeping issues as part of the Committee's attempts to clarify and support standards processes for the membership.

New:

Standards Committee Survey
- In 2024-2025, in support of the SAA Strategic Plan, the Standards Committee surveyed the SAA membership about its familiarity and use of standards and to gather recommendations for standards work. The goal of the survey was to help the Standards Committee be responsive to SAA members by supporting and facilitating work on standards in areas respondents thought most necessary and lacking.
- Slides with results of survey can be found here: https://docs.google.com/presentation/d/1CmwwRAbOsYjPGCJdyvLTTuDQupdDd-N_i2t7xviXlFk/edit?usp=sharing
- In addition to demographic questions and some questions about familiarity and current use of standards, we asked two open-ended questions. One asking for suggestions for areas in need of standards development and another asking survey respondents what the Standards Committee should focus its energies on. See the slides linked above for a synopsis of the responses.
- The Standards Committee reported on the survey at its Annual Meeting in July.

SAA STRATEGIC PLAN

(Please review the current Strategic Plan and indicate below how the component group has or plans to contribute to one or more of the four main goals.)

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 and Goal 4: Meeting Members' Needs

- **Standards Committee Survey**

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SAA ANNUAL MEETING

Number of attendees: 26
Link to meeting minutes: Agenda
Summary of meeting activities and highlights: Link to slides summarizing the Standards Committee Survey

SELF-ASSESSMENT

How would you describe the health or energy of the group, and how engaged are the members?

The Committee is on a healthier footing than it has been in past years. The membership is stabilizing, and Committee leadership has started to onboard and train committee members and set clearer expectations around participation. Providing clarity around roles and responsibilities

of committee members has empowered them and helped them figure out how to participate in more meaningful and satisfying ways.

Did the component group's leadership encounter any challenges in achieving its goals for the year?

In the past few years, the Committee has actively pursued projects to make standards creation and revision more transparent and to engage with SAA members about the direction of standards creation and support. That said, we have struggled with some practical work of the committee this past year, partly due to administrative obstacles and some weakness in SAA infrastructure. As a volunteer group, we also move somewhat slowly because the Committee leaders can only take on so much and ask so much of the membership.

What suggestions do you have for the SAA Council and staff that might help address these challenges in the coming term?

SAA Council might communicate a bit more directly with Committee leaders. We understand the desire for work on the Strategic Plan but wonder if a bit more engagement and direction might help with new or special projects Council might want the Committee to pursue. Our liaison was wonderful but it still feels that Committee leadership is a bit removed from SAA leadership and this hinders our visibility into the priorities of Council. In addition, the Standards Committee has members from outside the U.S. and is engaged on Standards that are more international in scope. Help from SAA Council in navigating the international dimension of archival standards creation and maintenance would be welcome.

What questions or concerns do you have for the SAA Council and staff?

We are grateful that some of the hiccups with rosters and membership seem to be ironed out. The more administrative support we can have, the more effective Committee leadership can be. Our tools (online forms and portals) are still not easy for us to edit and many of our web resources remain outdated for too long. It would be easier if we had a more efficient way to edit and improve these online resources.