



ARCHIVES • RECORDS 2025
Society of American Archivists
89th Annual Meeting & Expo

Update from TS-EAS

Technical Subcommittee – Encoded Archival Standards



**Technical Subcommittee on
Encoded Archival Standards**





This meeting is being recorded!

TS-EAS

Tuesday 22th of July

9 am PDT / 10 am MDT / 11 am CDT / 12 pm EDT /

4 pm UTC / 5 pm BST / 6 pm CEST / 7 pm EEST / 9.30 pm IST /

0 am CST next day / 2 am AEST next day

Thank you!

TS-EAS membership



July and August is a month of change

- There will be members:
 - Leaving
 - Reappointed
 - Newly appointed
- Liaisons changing



Thank you for your service!

Introduction to TS-EAS

Mary and Karin



Introduction to TS-EAS

- By-laws
(<https://www2.archivists.org/governance/handbook/section7/groups/Standards/TS-EAS>)
- Consists of up to 25 members
 - Both US-based and international members
- + two co-chairs (SAA and international)
- + early career member, liaisons and ex-officios





Introduction to TS-EAS con't

- Considers and implements requests from the community following the rolling revision cycle for minor revisions (annually) of the EAS standards
- Leads the major revision of EAS standards following SAA's and the Standards Committee recommendation for general review every 5 years



Introduction to TS-EAS con't

- Four committee-wide meetings per year
- Multiple subteams
 - <https://github.com/SAA-SDT/TS-EAS-subteam-notes/wiki/Sub-Teams-and-Charges#current-standing-sub-teams>
 - All teams to be introduced soon!



Introduction to TS-EAS con't

- Multiple communication formats
 - For all
 - EAS listserv (<mailto:ead@listserv.loc.gov>)
 - Email to TS-EAS forwarded to the co-chairs (ts-eas@archivists.org)
 - GitHub for meeting minutes, schemas, and committee documentation (<https://github.com/SAA-SDT>)
 - Only for members of TS-EAS
 - TS-EAS listserv (archivists-tseas@connectedcommunity.org)
 - Only-for-members Google Drive (for working documents)
 - Only-for-members Slack (new channel for TS-EAS, should subteams want to use it)



Introduction to TS-EAS con't

- Handbook (<https://github.com/SAA-SDT/TS-EAS-subteam-notes/wiki/Meeting-Policies-and-Procedures>)
- Our webpage (<https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas>)

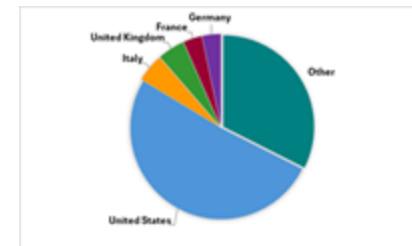
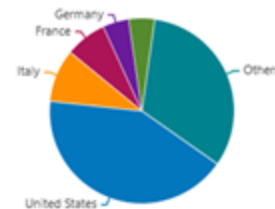


Links to web pages and email list

- EAC-CPF Official Home Page: <http://eac.staatsbibliothek-berlin.de/>
- EAD Official Home Page: <http://www.loc.gov/ead/>
- EAS (EAD/EAC-CPF) Listserv (electronic discussion list) <https://listserv.loc.gov/cgi-bin/wa?A0=EAD>
- EAS (EAD/EAC-CPF) List Subscription Settings <http://listserv.loc.gov/cgi-bin/wa?SUBED1=ead&A=1>

Web statistics (2024 in parentheses)

- EAC-CPF web statistics (<https://eac.staatsbibliothek-berlin.de/>)
 - 3,029 (3,011) visits and 5,846 (6,361) page views
 - 248 (367) downloads
 - Most used: <https://eac.staatsbibliothek-berlin.de/schemata-and-tag-library/>
- EAD web statistics (<https://www.loc.gov/ead/>)
 - 23,441 (26,032) visits and 47,607 (50,893) page views
 - 1,158 (1,353) downloads
 - Most used: <https://www.loc.gov/ead/>



Tack Gerhard and Glenn!



Email list statistics (2024 in parentheses)

- EAS mailing list
 - Current active membership (working email addresses) as of July 17, 2025: **1,260** (1,235)
 - Member locations: **37** countries/regions (U.S., U.K., Germany, Canada, Australia, France, Netherlands, Switzerland, Spain, and Italy most represented, in rough order)
 - Messages posted July 2024 through June 2025: **17** (34) messages on **14** (17) topics (approximately **21,420** (41,990) emails sent)

Tack Glenn!

Meet our liaisons

Standards Committee

Lara Michels (current co-chair / TS-EAS liaison)

Dan Michelson (current co-chair)

Heather Lember (incoming co-chair)



Standards Committee

- Initiates and facilitates the development of archival standards
- The Standards Committee is a key bridge between standards creators and SAA Council (which approves any standard)
- TS-EAS is a technical subcommittee of SAA's Standards Committee (along with TS-DACS, TS-AFG, and TS-GRD)
- The Standards committee appoints a liaison to TS-EAS and TS-EAS leadership attends the monthly meeting of the Standards Committee



Standards Committee Activities and Priorities

- Making the process of creating and revising standards clearer and easier to navigate
- Putting forth specific expectations for community engagement and diversity
 - Transparency
 - Continuous communication
 - Taking diversity into account with all its facets
- Ensuring that standards are needed by the community and accessible to the entire membership regardless of institution type and resource level

SAA EAS Section liaison



EAS Section

- See message from Janaya Kizzie, Senior Co-Chair and Jacqueline Devereaux, Junior Co-Chair on the EAS mailing list from the 18th of July
 - <https://listserv.loc.gov/cgi-bin/wa?A2=EAD;2d5dc2fe.2507&S=>

Subject: EAS Section Revamp and Leadership Call

From: "Kizzie, Janaya" <[log in to unmask](#)>

The Encoded Archival Standards (EAS) Section* of the Society of American Archivists (SAA) is an interest and advocacy group centered around the Encoded Archival Standards. Following a term of dormancy, the EAS Section is looking to revamp and expand.

We invite applications and nominations for new members, including incoming chair and co-chair. Future agenda items for the section will include reporting on and discussing TS-EAS* updates, assisting TS-EAS Outreach and Communications with dissemination of EAS information, organizing events related to EAS training and interest, and creating resources and guides for users of EAS. Placement on this committee is an exciting opportunity for archivists of all types of experience to bridge the Encoded Archival Standards with its implementers and begin to shape adoption, adaptation and maintenance of the standards from an end-user's approach.

The time commitment for Steering Committee members is roughly 2-5 hours per month, and for the co-chair, 2-5 hours per month for the first year, and about 10-15 hours per month for the second year. Please feel free to email current co-chairs Janaya Kizzie ([log in to unmask](#)) and Jacqueline Devereaux ([log in to unmask](#)) with any questions regarding the nominations/election process or the current and anticipated activities of the Section.

If interested, please submit the following by Friday, August 15, to [log in to unmask](#):

Candidate name

Job title and institution

Bio and candidate statement (1-2 paragraphs) describing your background and motivations for serving

Nominees must be current members of the Society of American Archivists to be considered.

Sincerely, the leadership of the EAS Section:

Janaya Kizzie, Senior Co-Chair

Jacqueline Devereaux, Junior Co-Chair

Meet our teams

Teamleads

Marie: EAC-CPF (tack Karin!)



EAC-CPF subteam

- Encoded Archival Context - Corporate Bodies, Persons, Families
- Cares about
 - Schema (files)
 - Documentation
- Consists of 6 members
 - Both US-based and international members
- Meets monthly via Zoom, first Thursday, 11:00am/12:00pm UTC
(i.e. 7am New York, 1pm Stockholm, 7pm Beijing, 9pm Melbourne)
- Documentation
 - <https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/eaccpf-subteam>
 - <https://eac.staatsbibliothek-berlin.de/>



EAC-CPF and what's going on

- Major revision v 3.0, to be released with EAD 4.0 and EAC-F 1.0
 - Alignment among all three standards
 - Schemas that work together
 - Simpler to adopt and move to new versions
 - Focus on richer description of agents, relying on EAC-F for robust description of functions and activities
 - Fuller representation of relationships among agents, activities, and resources
 - More on this later in the meeting!

Karin: EAC-F



EAC-F subteam

- Encoded Archival Context - Functions
- Cares about
 - Schema (files)
 - Documentation
- Consists of 4 members
 - Both US-based and international members



EAC-F subteam

- Meets
 - For finalising EAC-F/eaf/Functions we have met every second and in the end every week
 - Usually on Mondays at 1:00pm/2:00pm UTC (i.e. 9:00am EDT/EST, 3:00pm CEST/CET)
 - Virtually via Zoom



EAC-F and what's going on

- The basics
 - Creation of Encoded Archival Context - Functions (EAC-F)
 - Based upon ISDF
 - Inspiration from RiC (relations and name of relations mostly)
 - Creation of TL entries
 - Creation of XML-schema with the help of the Schema Team
 - Work closely connected with the work in the EAC-CPF Team
- Notes
 - <https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/functions-subteam/meeting-minutes>

Kerstin: EAD



EAD subteam

- Encoded Archival Description
- Cares about
 - Schema (files)
 - Documentation
- Consists of 10 members
 - Mostly international members with 2 US-based members
- Notes
 - <https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/ead-subteam>



EAD subteam

- Meets
 - Monthly
 - 4th Friday, usually 1.5 hours, 1:00pm UTC (i.e. 8:00am EDT/9:00am EST, 1:00pm GMT/2:00pm BST, 2:00pm CET/3:00pm CEST, 6:30pm India Standard Time, 9:00pm China Standard Time)
 - Virtually via Zoom



EAD and what's going on

- Major revision of EAD
 - Started in 2021 alongside the major revision of EAC-CPF and the development of EAC-F
 - Includes review and updates of the schema and schematron plus the Tag Library
 - Looks to extend the Best Practices Guide with additional and new examples
 - Looks to provide scripts and guidance for transforming existing data into EAD 4.0
 - Preparing submission to Standards Committee and SAA Council in autumn 2025
 - More details later!

Mark: Schema (tack Karin!)



Schema subteam

- Cares about
 - Schemas
 - Addressing requests from allied subgroups, i.e. EAC-CPF, Functions, and EAD teams
 - Responding to schema-related bug reports
 - Creating new schemas as required
 - Documentation
 - Creating, maintaining, and updating Tag Libraries and Best Practices Guide (Task Force)
 - Maintaining and revising any (technical) documentation created during the course of its work (e.g., guidelines on design patterns used in the schema-authoring process)
- Consists of 6 members
 - Mostly US-based with 2 international members



Schema subteam

- Meets
 - Monthly
 - 1st Friday, 1:00/2:00 pm UTC (i.e. 9:00 EDT/EST, 3:00 pm CEST/CET)
 - Virtually via Zoom



Schema team and what's going on

- Creation of the schemas and supporting rules and documentation for the three standards
- Creation of tag libraries and Best Practices Guideline for the three standards by the special appointed task force

Cory: Outreach and Communications



Outreach subteam

- Cares about
 - Promoting broader awareness of TS-EAS' activities and its work plans, across a range of key stakeholders and audiences
 - Liaising with the EAS Section and Collection Management Section leadership on communications, education, and outreach plans
 - <https://bit.ly/ts-eas-oc>
- Team membership
 - Smaller group this year, with three appointed members
 - Also includes liaisons from the affiliated SAA sections



Outreach subteam

- Meets
 - Monthly
 - 4th Wednesday of every month, 4:00pm/5:00pm UTC (i.e. 12:00pm EST/EDT, 6:00pm CE(S)T)
 - Virtually via Zoom



Outreach team and what's going on

- Supported EAD team with distribution of announcements and presentations
- Coordinated with SAA staff for online publication of materials

Updates from TS-EAS

Co-chairs and Teamleads

Mary and Karin: Alignment of our standards



Revision recommendations and schedule up until now

- Each standard had its own revision cycle
 - Considers and implements requests from the community following the rolling revision cycle for minor revisions (annually) of the Encoded Archival Standards (EAS)
 - Leads the major revision of the EAS following SAA's and the Standards Committee's recommendation for general review every 5 years
- Revision cycles for EAD and EAC-CPF were staggered
 - Has led to misalignment and discrepancies between the two standards, particularly with the shared elements
- Introduction of a third standard EAC-F would create yet another revision cycle



Moving forward

- We will still follow the revision cycle guidelines
 - Considers and implements requests from the community following the rolling revision cycle for minor revisions (annually) of the EAS
 - Leads the major revision of the EAS following SAA's and the Standards Committee recommendation for general review every 5 years
- However, all the EAS, i.e. EAC-CPF, EAC-F and EAD, will be treated as a suite of standards
 - Major revision will be happening for all at the same time
 - Minor revisions will happen yearly for them as needed and requested by the community

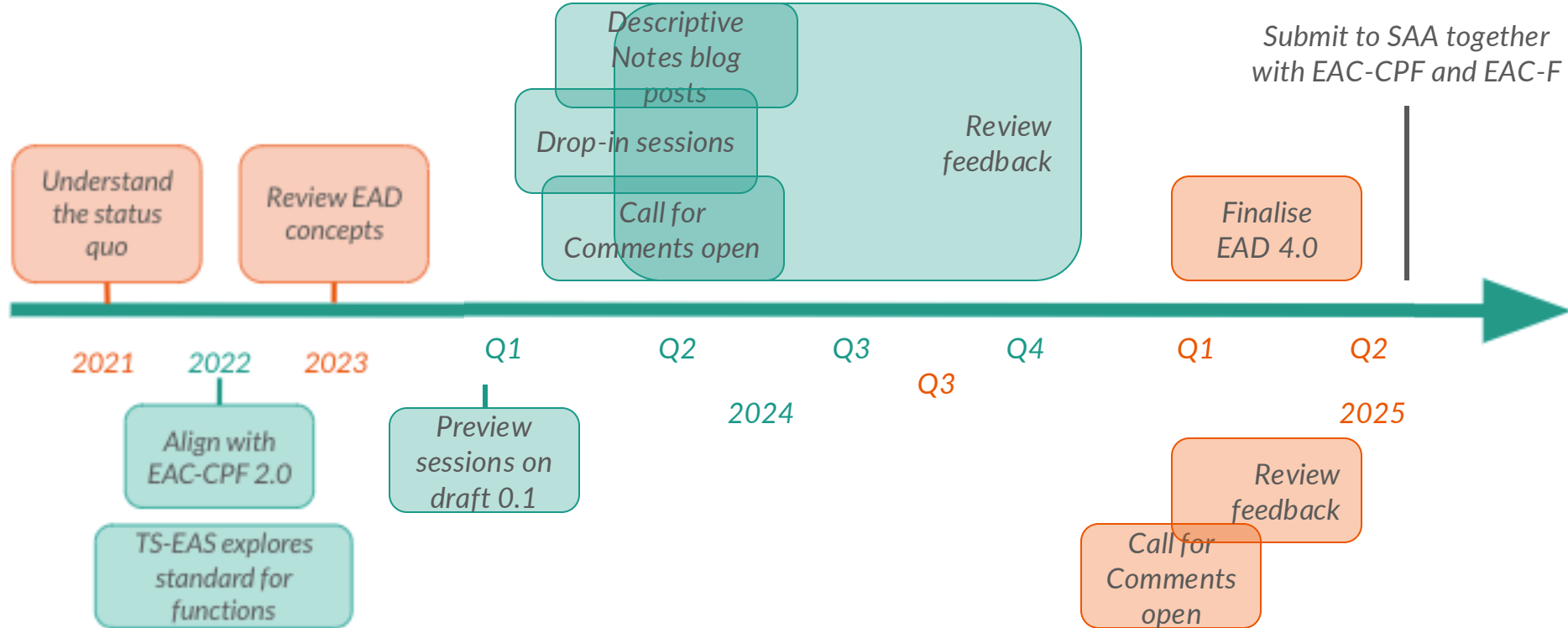


What's next?

- A proposal for a revision of all three EAS will be handed over to Standards Committee and from there to SAA Council
- Fingers crossed revision can start in autumn 2026
- Main focus: alignment to other standards like RiC and DadoCM and more

Kerstin: EAD revision

Overall timeline





Find all information

- On the TS-EAS page on the SAA website
 - Call for Comments 2024: <https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas/call-for-comments-revision-of-e-0>
 - Call for Comments 2025: <https://www2.archivists.org/groups/technical-subcommittee-on-encoded-archival-standards-ts-eas/final-call-for-comments-revision->



Find all information

- On the TS-EAS GitHub page
 - Overview Call for Comments documentation: https://github.com/SAA-SDT/TS-EAS-subteam-notes/tree/master/ead-subteam/major-revision_2021-2025_documents
 - Schema related issues: [https://github.com/SAA-SDT/eas-schemas/issues?q=is%3Aissue%20label%3A%22EAD%20major%20revision%20\(EAD%204.0\)%22](https://github.com/SAA-SDT/eas-schemas/issues?q=is%3Aissue%20label%3A%22EAD%20major%20revision%20(EAD%204.0)%22)
 - Tag Library related issues: [https://github.com/SAA-SDT/EAS-TagLibraries/issues?q=is%3Aissue%20label%3A%22EAD%20major%20revision%20\(EAD%204.0\)%22](https://github.com/SAA-SDT/EAS-TagLibraries/issues?q=is%3Aissue%20label%3A%22EAD%20major%20revision%20(EAD%204.0)%22)



Benefits of EAD 4.0

*Developed by and for cultural heritage
professionals around the world.*





1 Interoperable

Aligns EAD with EAC-CPF 2.0.

Enhances interoperability across standards.

Allows greater data reuse.



How this shows in EAD 4.0

- Alignment with EAC-CPF and EAC-F
 - camelCase spelling to enhance readability and recognizability of element names
 - Provided opportunity to generally revise element names, aligning with terminology of other related standards and resolving abbreviations and acronyms to support understanding
 - Shared elements and attributes defined in the same way across all EAS
- Examples include
 - The <control> element, elements for encoding dates, places and place names, attributes for internal and external referencing
- New in draft 0.2 as published in April 2025
 - The basic content model for <formAvailable> is now closer to the other entity elements (<agents> and <places>) than to the narrative elements (e.g. <scopeContent>), while the element retains the full <relations> element

2

Sustainable

Implements the latest archival concepts and models.

Improves linking between descriptive elements.

Supports richer relations between records and agents.





How this shows in EAD 4.0

- Related entities
 - While EAD 4.0 keeps in the overall familiar structure, elements representing related entities have received an elevated position and general overhaul
 - Could provide a starting point for the EAS becoming more modular in future revisions
- Examples include
 - The elements <agent>, <formAvailable>, and <place>
 - Whether the element <function> will remain in this category, is **currently under review**
- **New in draft 0.2 as published in April 2025**
 - With additional sub-elements shared with <archDesc> and the <c> elements (e.g. <extent>, <accessConditions>, <processInfo> etc.), the element <formAvailable> can now be used to more completely encode information about different instantiations and is hence a little bit closer to the relevant entity in Records in Contexts



3

Exchangeable

Focuses on EAD as a data encoding and exchange standard.

Enhances linked data support.

Supports relations comprehensively.



How this shows in EAD 4.0

- Relations and external references
 - The element <relations> has been integrated more directly into relevant element contexts
 - Nearly half of the elements in EAD 4.0 now allow for referencing external vocabularies
- Examples include
 - The elements <otherDescription>, <publicationNote>, <relatedMaterial>, <separatedMaterial>, all enable <relations> as a direct child element
 - Elements <archDesc> and <c> allow references to external vocabularies, thereby providing a dedicated encoding of persistent identifiers for records, record sets, and record parts
- **New in draft 0.2 as published in April 2025**
 - The encoding of physical description and dates relevant to the unit of description now starts with only one grouping element (<physicalDescription> and <unitDate>) rather than several
 - Within these grouping elements, it is still possible to capture structured as well as unstructured information

4

Extensible

Streamlines specific elements into reusable ones.

Enables reuse of external formatting schemas.

Limits mixed content to three built-in elements.





How this shows in EAD 4.0

- Re-using elements of the same scope and intent in different contexts
- Streamlining content models for elements
- Focussing on a limited mixed content model of the same three elements in all contexts
- Focussing on encoding information rather than encoding how information is displayed
- Allowing for the inclusion of attributes from other namespaces where required/suitable
- Examples include
 - The <findAidDesc> element re-using <title>, <agent>, <date> instead of specific elements
 - The mixed content elements <reference>, <referringString>, and
 - The element <formattingExtension>
- **New in draft 0.2 as published in April 2025**
 - Using the same generic elements to encode the names and roles of related entities and the relationship they have with the materials being described



From draft 0.2 to finalising EAD 4.0

- Received 16 new comments in total
- 9 related to the schema (1 identified as irrelevant afterwards)
- 7 related to the Tag Library (2 were straightforward bugs; 1 required clarification from the issue submitter)
- Various issues around clarifying the use of <formAvailable> for specific existing use cases of (digital) instantiations plus a handful of issues dealing with other individual elements
- **Most issues turned out to rather require clarification in the Tag Library and more specific examples**
- Changes affecting the schema include:
 - Re-introducing <physicalDescription> as a grouping element
 - Adding an attribute @normalizedForm to <referringString>
 - Refactoring <subject> to term-based rather than an entity element



What's next

- Final aspects will be discussed during the TS-EAS Annual Meeting in August
 - Afterwards, the schema and Tag Library will be updated as necessary
 - Accompanying documentation will be revised and updated
- Submission to SAA Standards Committee and afterwards to SAA Council
 - Together with EAC-CPF 3.0 and EAC-F 1.0
- We are always looking for **additional real-world examples** - if you have some that you'd like to share, you can:
 - Comment directly on [GitHub](#) in the respective issue
 - Submit a comment via our [web form](#)
 - Send us your comment via [email](#)

Marie and Karin: Alignment of EAC-CPF and EAC-F alongside the EAD revision

—



Sharing

- We share control
 - Looks the same with exception of the (new) attributes that are used to define the list of values used in certain attributes throughout the description (e.g. values for @addressLineType, @level or @identityType)
- We share elements and attributes
 - Elements like relations, dates, place, p, etc.
 - Attributes like target, id, languageOfElement, valueURI, sourceReference, etc.



Result of sharing

- Sharing in its full extent
- Sharing name = sharing definitions
 - Might differ in where an element is being used
 - Reuse in both TL and Schema
- Sharing vocabulary values and definitions of the values as applicable



Moving forward

- The three standards are aligned
- The three standards influence each other

Questions?

All

**Thanks very much for your attention
and your questions / comments!**

TS-EAS will be holding an online information session during our TS-EAS annual meeting taking place between 11-14 August.

The session is currently scheduled for Thursday, August 14th, from 11.30 AM CT. Using Zoom, an invitation where you need to register to be able to attend will be sent out soon!

