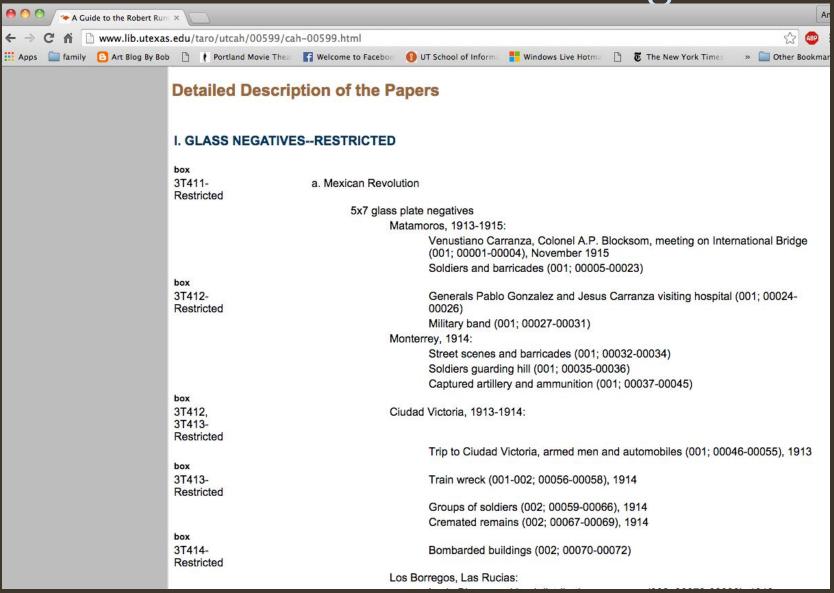# Texas Archival Resources Online

A Community Driven Redesign
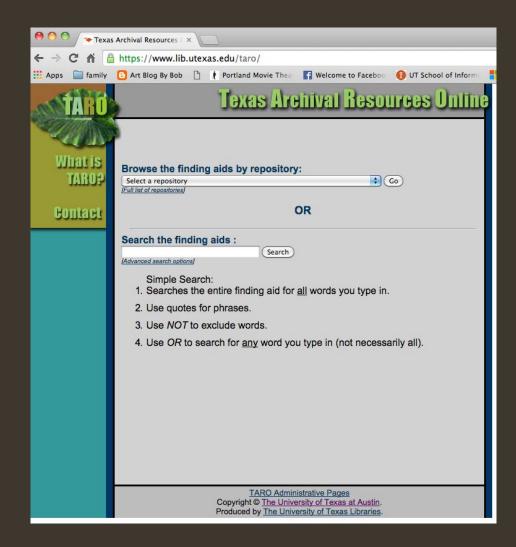
What is an archival finding aid?
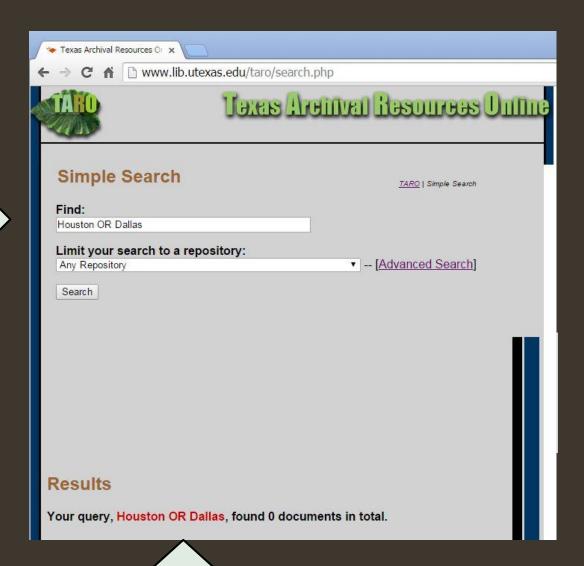
A bit of background about TARO…

- Startup funded by 1999 grant from the Texas Telecommunications Infrastructure Fund
- Current staffing: 5% FTE of one programmer at UT Libraries
- 500 new finding aids per year from archives across Texas
- One million visitors per year; 581,000 unique users

According to TARO, none of our finding aids mention Houston or Dallas...

A homegrown Steering Committee emerges...

- Set up in 2011 after visioning meeting
- Includes members from institutions across the state
- Voluntary participation with member time donated by repositories
- Does not currently have term limits or a formal process for joining the committee
- Articulated priority improvements needed for TARO

Priorities for TARO improvements

1) Moving towards shared standards within TARO, with a short-term goal of changing from a dtd-based compliance checker to schema-based compliance, and longer-term goal of adopting shared best practices for archival description and EAD-encoding
2) Functional and technical improvements to enhance usability (e.g., search and browse capability, better results display; ADA-accessibility)
3) Aesthetic improvements (e.g., updated TARO stylesheet and modern branding)
4) Creation of training documentation for new TARO members, including webinars
5) Outreach to similar consortia and possible administrative partners
6) Improved public relations with current and potential TARO members and users
7) Establishment of a funding model that will make these changes possible and sustainable

TARO NEH Planning Grant, 2015-2016

- A written plan that includes action steps for improvements to TARO to be used for implementation focused on:
  - Workplans
  - Staffing
  - Budget

- New policy documents to solidify TARO's infrastructure:

  - Updated mission and vision statements

  - Collection development policy

  - EAD best practices

- Vision for sustainability

- White paper detailing findings of planning activities, user studies, and lessons learned
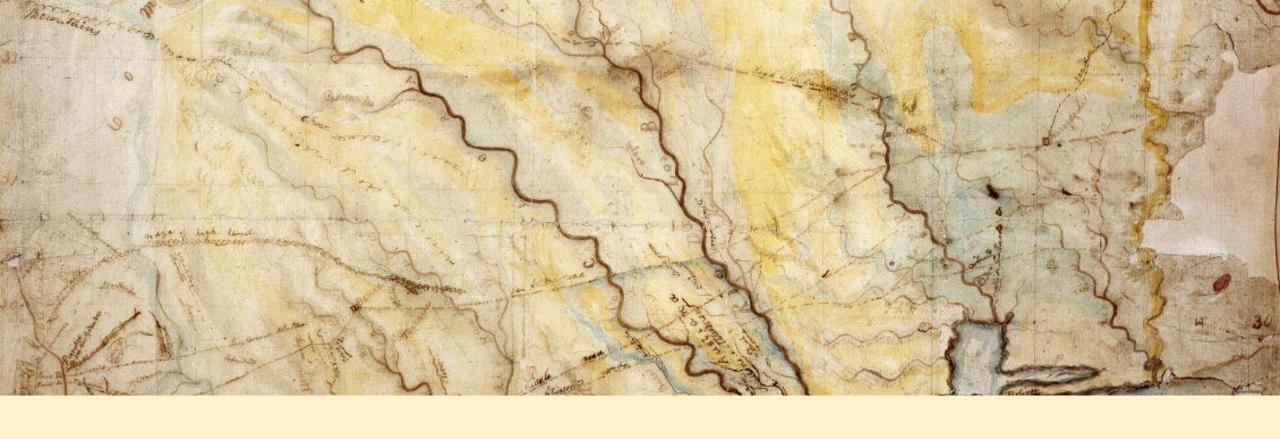
What did the grant fund?

- Project manager: to write narrative, workplan and budget for subsequent implementation phase; facilitated mid-project meeting; outreach to other consortia and initiatives; assigns tasks to TARO working groups
- Two student positions worked on data standardization planning
- Two project meetings for Steering Committee and project manager: July 2015 and January 2016

TARO Working Groups Charges

- Technical/website (WebTex) Committee: write functional requirements, test platform instances (XTF, AtoM, ArchivesSpace)
- Education & Outreach: update contacts list, formalize communication methods, recommend process for onboarding new members, review training materials by other consortia
- Funding & Sustainability: poll repositories and summarize member attitudes towards funding models
- Governance: update mission statement, draft bylaws
- Standards: draft best practices guidelines
- Maintenance: advise on technical maintenance of platforms tested

Communication methods

- TARO email listserv
- Repository contact email list
- Wiki page: http://bit.ly/YhRZu7
- Blog: https://blogs.lib.utexas.edu/taro/
- Gmail address
- Yearly meetings at Society of Southwest Archivists annual meeting

What we've accomplished

Schema-compliance project

- What is schema compliance?

- Why make this change now?
  - Most basic change needed for TARO to make a move to a new platform in the future
  - Allows CMS users who already create schema-compliant EAD to participate again in TARO

- Progress to date

  - Hannah Rainey (iSchool intern) evaluating work plan Fall 2015

  - Groups A, B, and C identified and scheduled for conversion in Spring / Summer / Fall 2016

  - Group A almost through conversion, following up on display issues

Establishing TARO-wide standards

- Reviewed best practice guidelines for EAD by other consortia in the U.S.

- Revised TARO's encoding guidelines (not updated since the transition to EAD 2002) to expand and update them for EAD 2002 Schema

- Calling for comments and suggestions on our newly drafted EAD 2002 Schema best practice guidelines (BPG) for TARO

  - Read our BPG at http://bit.ly/1Wk6p6W

TARO's use of controlled access terms

- Data extraction: over 153,000 <controlaccess> instances

- Common encoding errors:
    - no values or contradictory values
    - periods, dashes, spaces, syntax
    - element confusion

- Key issues:
    - authority search/browsing feature? according to which controlled vocabularies?
    - minimum number/variety of terms per submitted finding aid?
    - training and quality control mechanisms?

Mission & vision statements

- TARO brings together historical documents, personal papers, family histories, and more from archives, libraries, and museums across Texas to inform, enrich, and empower researchers all over the world to discover information for educational and professional purposes, as well as for personal enjoyment--helping users tell their story

- TARO fosters a culture of collaboration among Texas archives, libraries, and museums allowing participants to overcome challenges together. TARO is looking at the yet unknown needs of 21st Century researchers for interacting with content by enhancing the field of archival practice. TARO self-identifies as a community responsive to changes in technology, demographics, and resources

Collections development policy

- General purpose and historical background

- Mission, vision, and audience

- Program scope and subject strengths

- Participation criteria and requirements for participation

- Standards and best practices

- Collaboration

- Disposition and digital preservation

- Draft available at: http://bit.ly/1Tr7dlU

TARO participation criteria

Sets up a process for joining TARO:
- Email letter of interest to Steering Committee 2x per year (May 31 and November 30)
- Priority consideration for repositories that have received state and/or federal money for processing archives
- No set number of new applicants; depends on institutional capacity of new applicants and TARO's current capacity
- New members begin twice a year in cohorts

Requirements for participation:
- Collections should be in the legal custody of institutions
- Institution must designate a TARO representative
- Institution must be open to the public
- Copyright of finding aid must be released so metadata can be shared on aggregators like ArchiveGrid.

Evaluating potential new platforms for TARO

- Technologies & Website subcommittee

- Platforms selected

- Evaluation process

- Valuable feedback

User studies at Rice University

- Non-archivists tried the same reference type tasks in the test platforms
- *Very* small scale test, but useful in terms of planning additional future testing.
  - users unfamiliar with finding aids and don't always understand what is being shown
  - found sites to be lingo-heavy
- Overall, preferred AToM and XTF as platforms

Some changes to the initial grant plan

Governance:

- Initially planned to create by-laws for TARO, shifted to exploring organizational home and formalizing the existing TARO Steering Committee

Funding & Sustainability:

- Initially planned to poll repositories about their capacity to contribute to a subscription based TARO

- Project manager Leigh Grinstead and project consultant Jodi Allison-Bunnell advised Steering Committee to determine TARO's institutional home before we pursue this

Plans for the upcoming year

- Institutional home talks continue

- Planning for the implementation phase of the project & associated grants

- Bridge project funding

Potential projects for the coming year

- Reviewing and reporting on just-released EAD2002>EAD3 conversion walk through

- Repository self-review of existing controlled access terms

- Creation of basic guide for devising subject headings and other controlled access vocabulary

- Decision-making on standards to be used for controlled access terms

- Creation of lists of approved controlled access terms using excel docs generated by student project

- NHPRC training grant writing

- Creating/selecting a TARO logo

- Other????

Questions? More info at:
https://blogs.lib.utexas.edu/taro/