

# Background: "Toward a National Archival Finding Aid Network" Planning Initiative (2018-19)

## Summary

With crucial funding support from the US Institute of Museum and Library Services (IMLS) under the provisions of the [Library Services and Technology Act \(LSTA\)](#), administered in California by the State Librarian, the CDL coordinated a 1-year collaborative planning initiative (October 2018 – September 2019) with the following key objectives:

- Identify key challenges facing finding aid aggregators.
- Uncover and validate high-level stakeholder (archivists, researchers, etc.) requirements and needs for finding aid aggregations.
- Explore the possibilities of shared infrastructure and services among current finding aid aggregators, to test the theory that collaboration will benefit our organizations, contributors, and end users. If so, identify potential shared infrastructure and service models.
- Determine if there is collective interest and capacity to collaborate on developing shared infrastructure.
- Develop a concrete action plan for next steps based on the shared needs, interests and available resources within the community of finding aid aggregators. Discussions of viable collaboration models and sustainability strategies will be included.

Developing a collective understanding of requirements and challenges was a necessary first step for establishing the trajectory of any future finding aid aggregation effort. The planning initiative produced the following key deliverables.

## Key Deliverables

See [Project Reports and Resources](#)

## Grant Proposal

[LSTA \(2018-19\) Project Proposal 40-8847](#)



## Partners and Roles

Group	Role	Member resources
<b>Core Partners</b>	<p>This group comprised representatives from state and regional archival description aggregators. Members did not represent their institution but rather leveraged their background and experience within the field to inform the group's work. Expectations for Core Partners:</p> <ul style="list-style-type: none"> <li>• Identify one or more individuals who can provide complete, objective, and correct information on the past and/or present program, for incorporation into a profile of the current US archival description aggregator landscape</li> <li>• Review the profile and findings, in advance of the symposium;</li> <li>• Prepare for and attend the symposium;</li> <li>• Serve on one or more working groups after the symposium and participate actively in the work of those groups;</li> <li>• Participate actively in formulating and vetting the action plan that results from this work.</li> </ul>	Roster
<b>Advisory Partners</b>	<p>This group comprised representatives from state and regional projects or programs that provide some form of support for finding aid and archival description aggregation, but who did not have capacity at this time to be Core Partners. This group also included those entities no longer providing services, as well as those planning to do so in the future. Expectations for Advisory Partners:</p> <ul style="list-style-type: none"> <li>• Identify one or more individuals who can provide complete, objective, and correct information on the past and/or present program, for incorporation into a profile of the current US archival description aggregator landscape.</li> <li>• Review and optionally provide feedback on the action plan that results from this project.</li> </ul>	Roster
<b>Expert Advisors</b>	<p>Advisors were invited to the project symposium to advise, inspire, and contribute to the discussions in a variety of key areas. This group included representatives from organizations that provide services that are part of the archival description ecosystem, as well as organizational development, community engagement, and sustainability. Expectations:</p> <ul style="list-style-type: none"> <li>• Review the profile of the current US archival description aggregator landscape, in advance of the symposium;</li> <li>• Prepare for and attend the symposium in spring 2019.</li> <li>• Constructively comment on the action plan that results from this project.</li> </ul>	Roster
<b>Project Team</b>	<p>Jodi Allison-Bunnell (<a href="#">AB Consulting</a>): Jodi's responsibilities included: providing leadership and research analyst support services for surveying and establishing a profile of finding aid aggregators and related organizations; facilitating stakeholder discussions; and assisting in the creation of a final report and recommendations.</p> <p>Adrian Turner (<a href="#">California Digital Library</a>, Senior Product Manager): Adrian's responsibilities included: coordinating project activities; supporting CDL's administration of the LSTA-funded project; and serving as a Core Partner, drawing from his experience with CDL's Online Archive of California (OAC) service.</p>	