

Staffordshire and Stoke-on-Trent Joint Archives Committee, Thursday, 22 October 2015

PAPERS TABLED AT THE MEETING

6. Review of Fees and Charges 2016/17 (Pages 1 - 16)

Joint report of the Acting Director for Place (Staffordshire County Council) and City Director of Resources – Assistant Chief Executive (Stoke-on-Trent City Council)

John Tradewell
Director of Strategy, Governance and Change

Local Members Interest
N/A

Staffordshire and Stoke on Trent Joint Archive Committee 22 October 2015

Review of Fees and Charges 2016-2017

Recommendation(s)

1. That the fees and charges proposed in Appendix two to this report be approved for introduction by the Joint Archive Service from April 2016.

Report of Acting Director for Place (Staffordshire County Council) and Chief Operating Officer – Resources Directorate (Stoke on Trent City Council)

Reasons for Recommendations

2. The Archive Service fees and charges have been reviewed on an annual basis for a number of years to allow the Service to adapt its services according to demand and cost of provision. The proposed fees and charges are recommended for approval as they represent a fair and reasonable increase.

Background

3. The standard sources for income generation for the Archive Service are: a range of copying services; the sale of photographic permits; research, transcription and certification services; sales of publications; donations; and fees for talks by and group visits to the Archive Service. In addition from 2014 the Archive Service has benefitted from income from its partnership with a commercial provider to make key archive collections available online. Each year the Service reviews its fees and charges based on:

- Staff time to deliver the service
- Cost of equipment and associated maintenance
- Postage costs
- Economic climate
- Changing technology
- Availability of resources online

4. The review is intended to be a balanced approach which encourages use of services whilst still ensuring that income is generated to support the running of such services.

5. This year the main change to the fees and charges has been the increase of the research fee as this involves staff time. This fee is the basis for other charges and means there have been increases to other fees summarised below:

- Research fee

- Quick research fee and Hospital Records search fee
- Marriage bond search fee
- Certification fee
- Copies of wills
- In house photography charge
- Publication fees
- Talks and visits charges

6. The research fee was increased last year after being held for three years. Despite the availability of parish registers online since July 2014 some researchers still request a search by staff. Since August 2015 90% of the parish registers are now online and the wills and marriage bonds are due to go online by the end of the year. The Service will continue to advise users to take advantage of the online service either free at a library in the County or City, however a request for a research by staff will incur a fee based on the time taken to search and download, print or copy the relevant document and advise on the next steps for research.

7. The use of microfiche of parish registers has reduced in some of the Service reading rooms and has meant a fall in the number of research orders compared to the same period last year. The number of orders will continue to be monitored in terms of resourcing the service in the future.

8. The charge for copies of will has been increased as by April 2015 this collection will be available online through Find My Past. Therefore requests for copies of original wills will be directed, as far as possible, via the online service. The increase in the fee sets it on a similar basis to the research fee and transcription fee for the Staffordshire Name Indexes website.

9. The publication fees have also been reviewed and increased again this year. Requests to reproduce items from collections can be time consuming involving clearing permissions with document owners and often responding at short notice. The fees charged for commercial use have been increased to take account of these factors. The community publication fees have been held to continue to support local groups who use our collections to promote awareness and understanding of the history of the county.

10. The fees for talks to groups and group visits to the Service have also been increased this year again. This involves staff time to prepare, deliver and in the case of talks travel to the venue. Talks are also beneficial in enabling the Service to engage with local groups and promote the collections and work of the Service, however the time involved does need to be reflected in the charge.

11. The review has been carried out following a benchmarking exercise with neighbouring archive services and in consultation with frontline staff and public service managers.

Appendix 1

Equalities implications:

In reviewing its fees the Archive Service has continued to maintain its lower research fee for people with disabilities.

Legal implications:

The content of this report complies with the joint agreement governing the work of the Joint Archive Service.

Resource and Value for money implications:

Overall the Joint Archive Service has income targets of £48, 210 which breaks down to £6,190 for the City service and £42,020 for the County service.

This report introduces new fees which offer more choice for users of the service and also represent good value for money.

Risk implications:

At this point in the year income is under target for research but photocopying is holding up. Other sources of income include the vending machine at Stafford, charges for storage of Public Records transferred early and for provision of conservation training for other archive services. These areas will help to contribute to income targets but the charges are made towards the end of the financial year.

Climate Change implications:

No significant implications.

Health Impact Assessment screening:

No significant implications.

Report author:

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List of Background Papers

Papers	Contact/Directorate/ext number
Joint Archive Service Scale of Fees and Charges, 2015/2016	Joanna Terry/Place/ x278370
Orders and income ledgers, 2015/2016	

STAFFORDSHIRE AND STOKE- ON- TRENT ARCHIVE SERVICE

REVIEW OF FEES AND CHARGES, 2016/2017

The current fees and charges and proposed changes are set out below. The proposed new charges would apply from 1 April 2015.

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
RESEARCH FEES				
<p>1. Research fees Includes searches in original documents such as parish registers, calendars of wills, wills, census returns, tithe and enclosure maps, manorial and estate records and local newspapers.</p> <p>1.1 Quick research fee A 15 minute look up of a single item in a record e.g. electoral register, parish register or other records and a single copy of an entry where applicable. This does not include searching catalogues.</p> <p>1.2 Hospital records search fee This fee is based on the standard photography charge and quick search fee using indexes to locate entries in hospital records. Digital images of the records are included in the fee.</p>	<p>£26-00 per hour to include the cost of up to 4 copies and UK/EU postage</p> <p>Minimum charge- £13-00 to include the cost of 2 copies and UK postage</p> <p>£17.50 per hour to include the cost of up to 4 copies and UK postage for people with disabilities.</p> <p>£6.50 (£5.41 + £1.09 VAT) First class postage charged additionally. £4 for people with disabilities.</p> <p>£26-00 (£21-60 + £4-40 VAT) plus £6.50 (£5.41 + £1.09 VAT) search fee</p>	<p>EU orders: increase</p> <p>£28-00 (£23-33 + £4-67 VAT)</p> <p>First class postage charged additionally. £19-00 for people with disabilities</p> <p>£7.00 (£5.83 + £1.17 VAT) First class postage charged additionally. £4-70 for people with disabilities</p> <p>£28-00 (£23-33 + £4-67 VAT) plus £7.00 (£5.83 + £1.17 VAT) search fee</p>	<p>Non-EU orders: increase</p> <p>£28-00</p> <p>Non EU postage charged additionally</p> <p>£7-00</p>	<p>This fee was increased for the first time in three years last year and is increased this year to reflect the fact that online access is now available to the parish registers with other sources soon to be available. Several other charges are based on this fee and therefore they are increased.</p> <p>This service was introduced to enable requests for single entries to be dealt with and encourage some income where an enquirer is reluctant to place an order for an hour of research. Confirming the availability of records from the catalogues is still provided free of charge. It goes up in line with the research fee.</p>

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
2. Marriage Bond Searches	<p>£13-00 (£10.83 + £2.17 VAT) for up to 2 searches and including provision of up to 4 copies of marriage licence records. UK postage included. Overseas postage charged at current rates.</p> <p>Single search £6.50 (£5.21 + £1.04 VAT) and provision of single copy. First class postage charged additionally.</p>	<p>EU Orders:</p> <p>£14-00 (£11.66 + £2.34 VAT) for up to 2 searches and including provision of up to 4 copies of marriage licence records. Standard UK/EU postage included. First class postage charged additionally.</p> <p>£7.00 (£5.83 + £1.17 VAT) and provision of single copy. First class postage charged additionally.</p>	<p>Non-EU orders:</p> <p>£14-00 for up to 2 searches including provision of 4 copies of marriage licence records. Non EU postage charged additionally</p> <p>£7.00 (£5.83 + £1.17 VAT) and provision of single copy. First class postage charged additionally.</p>	<p>This fee is set in line with the standard research fee.</p>
3. Search and supply of copy of individual's baptism / marriage entry for official purposes	<p>Successful search with copy supplied £10.00</p> <p>Unsuccessful search £6-50</p>	<p>Successful search with copy supplied £10.50 (£7.00+£3.50)</p> <p>Unsuccessful search £7.00 (£5.83 + £1.17 VAT)</p>		<p>This fee is set in line with research fees and copying charges.</p>
4. Transcription fee for documents identified in online indexes	<p>£7.00</p>	<p>EU orders No change £7-00 (£5.84 + £1.16 VAT) Includes standard UK/EU postage</p>	<p>Non EU orders No change £7-00</p> <p>Non EU postage charged additionally</p>	<p>This fee covers a range of sources which are copied or transcribed from the Staffordshire Name Indexes website. It is held in line with research fees this year.</p>

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
5. Certification fee	£13-00 per document	£14-00		The certification fee is linked to the research fee and therefore goes up. Certifications are hand-written by the Head of Service and often at very short notice to meet administrative / ecclesiastical /legal requirements.
COPYING CHARGES	CURRENT	PROPOSED		COMMENTS
6. Photocopies identified and ordered in reading rooms	60p per copy A4/A3 (B&W) £1.50 per copy A4/A3 colour (£1.25 + 25p VAT)	EU orders: No change	Non EU orders: No change	This fee was increased in 2012 and is held this year.
Page 7 Photocopies ordered by post	First copy, incl. UK postage and packing £3-50 (£2.92 + £0.58 VAT) First class postage charged additionally. Successive copies on same order - £1-00 (£0.83 + £0.17 VAT) per copy	EU orders: No change	Non EU orders: No change Non EU postage charged at current rates	The charges were increased in 2013 and aligned with the charge for scans under as the two services were brought together.
8. Photocopies of wills by post- staff assisted	Flat rate of £5-50 per will irrespective of the number of photocopies and to include UK post and packing Flat rate of £7-50 for international orders to include postage	EU orders: No change Flat rate of £7-00 per will to include UK standard post and packing First class postage charged additionally	Non-EU orders: No change Flat rate of £7-50 including non-EU postage	The UK fee was last increased in Jan 2011. The fee was increased for non-EU orders in 2012. The wills are due to go online with Find My Past by the end of 2015. Therefore people will be able to access these documents online themselves at home or in a Staffordshire or Stoke Library. Requests for staff to provide copies will be charged in line with the Quick Research.

COPYING CHARGES	CURRENT	PROPOSED		COMMENTS
9. Microform print outs : self service in reading rooms	60p- self service	No change		This fee was increased in 2010 to take account of assistance given to customer and the increase in VAT. It is held this year to keep it in line with photocopies.
10. Microform print-outs by post	£3-50 (£2.08 + £0.42 VAT) for first copy £1.00 for each additional print-out First class postage charged additionally Non EU postage charged additionally	EU orders: No change	Non-EU orders: No change	The first copy price was increased last year is held along with the additional print cost.
11. Computer print outs on site	10p	No change		This charge has been held in line with Library Service fees in the County and the City.
12. In-house Photography Charges	£26 per hour fee for photography including prints Additional charge of £13-00 per half hour on any order involving conservation team	EU customers £28-00 (£23-33 + £4-67 VAT) £14-00 (£11.66 + £2.34 VAT) per half hour	Non EU customers £26-00 (£21-60 + £4-40 VAT)	The scanning and photography charges were substantially reviewed in 2012. The fee goes up in line with the research fee.
13. Permit Fees for Use of Digital Camera	£7-00 daily fee £50-00 annual fee	£7-00 daily fee £50-00 annual fee No change		The daily and annual fees were increased in 2012. The fees are held this year.
14. Photography on Archive Service premises	Proportion of additional staff time required to facilitate and supervise photography based on current research fee scale	No change		This charge is linked to the research fee.

COPYING CHARGES	CURRENT	PROPOSED		COMMENTS
15. Photographic and microfilming orders handling fee for commercial orders	Flat rate of £50-00	EU orders: No change £50-00 (£41.67 + £8.33 VAT)	Non EU orders: £50-00	The Archive Service uses the nearest archive service which offers this service and which can provide the requisite security and quality standards. However this necessitates a greater input of staff time in transporting documents for filming.

<p>16. Publication fees for the reproduction of documents in: exhibitions, hard copy or online publications or media broadcasting.</p>	<p>Sliding scale of charges according to the nature of the publication, print run or broadcast</p> <p>Community /academic journal publication/ website/ exhibition/ DVD: £10-00 for first item, plus £5-00 for each additional item</p> <p>Commercial publication: hard copy/exhibition/ website: £35-00 for first item, plus £15-00 for each additional item</p> <p>Commercial publication: hard copy/exhibition/ website and e-book rights £60-00 for first item and £25-00 for each additional item as a wrap up fee for both hard copy and e-book rights</p> <p>TV broadcast and onsite filming and world wide web publication: standard fee set at £170 for world wide rights for first item; £65-00 for each additional item. Filming on site only £170 per half day.</p>	<p>No change</p> <p>£40-00 for first item, plus £20-00 for each additional item Commercial publication: hard copy/exhibition/ website and e-book rights £70-00 for first item and £35-00 for each additional item as a wrap up fee for both hard copy and e-book rights</p> <p>£180 for world-wide rights for first item; £75-00 for each additional item. Filming on site only £180 per half day.</p>	<p>These fees are held for this year.</p> <p>These fees were last increased in 2015 and are increased for commercial use this year.</p> <p>Again these fees are increased for commercial use. Meeting film companies deadlines and supervising filming takes a lot of staff time and supervision.</p>
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OUTREACH SERVICES	CURRENT	PROPOSED	COMMENTS
<p data-bbox="91 209 517 276">17. Talks to / visits by external organisations and groups</p> <p data-bbox="91 671 136 810" style="writing-mode: vertical-rl; transform: rotate(180deg);">Page 11</p> <p data-bbox="91 906 584 970">18. Use of meeting room (LARC) at Staffordshire Record Office</p>	<p data-bbox="730 209 1003 276">£45-00 County/City £50-00 out of county</p> <p data-bbox="730 480 1016 544">Saturday group visits: £50-00</p>	<p data-bbox="1131 209 1404 276">£50-00 County/City £55-00 out of county</p> <p data-bbox="1131 480 1417 544">Saturday group visits: £55-00</p> <p data-bbox="1131 616 1594 815"> (£5 extra for out of county groups) £55-00 group visit including tour of strongrooms £60 -00 group visit including tour of strongroom and also visit to conservation workshop</p> <p data-bbox="1131 919 1413 951">Per four hour session</p> <p data-bbox="1131 991 1568 1126">£20 SCC meetings, adult education, local history and other societies, non-profit making local organisations or individuals</p> <p data-bbox="1131 1158 1491 1190">£58 commercial companies</p>	<p data-bbox="1617 209 2179 443">These fees were last increased in 2013 and at the recommendation of the JAC travel expenses for out of county talks were added on. This fee is increased to keep pace with the charge for research as it also involves staff time to prepare and deliver the talk or group visit.</p> <p data-bbox="1617 480 2179 679">Fees may be waived for retired / disabled groups at the discretion of the Archive Service. The proposed fees are in line with the County Museum scale of fees. Group visits on Saturdays require additional staffing.</p>

Staffordshire Joint Archives Income 2013-2016					
		Year		Projection	Budget
		2013-14	2014-15	2015-16	2015-16
Core services					
Other Income					
69112	Donations Bequests	(1,000.00)	(2,110.00)	(2,000.00)	(3,060.00)
69162	General (790 01)	(1,131.10)	(1,000.00)	0.00	0.00
		(2,131.10)	(3,110.00)	(2,000.00)	(3,060.00)
Staffordshire County Sites and Public Services					
Fees & Charges Income					
68210	Genealogical	(5,695.44)	(5,706.72)	(4,862.00)	(7,300.00)
69122	Photocopying	(13,908.10)	(10,427.40)	(10,404.00)	(12,440.00)
		(19,603.54)	(16,134.12)	(15,266.00)	(19,740.00)
Other Income					
69112	Donations Bequests	(931.72)	(1,010.07)	(810.00)	(810.00)
69110	Other Income	0.00	(347.00)	0.00	0.00
69162	General (790 01)	(3,435.47)	(1,170.00)	(1,000.00)	(1,330.00)
		(4,367.19)	(2,527.07)	(1,810.00)	(2,140.00)
Sales Income					
65006	Vending Machine	(995.45)	(1,397.96)	(610.00)	(610.00)
65108	Photos Pictures	(14,521.75)	(10,571.59)	(8,660.00)	(8,660.00)
65116	Stationery	(176.16)	(30.17)	(12.00)	(2,400.00)
65304	Sale of Books	(2,632.72)	(1,584.93)	(1,762.00)	(2,910.00)
		(18,326.08)	(13,584.65)	(11,044.00)	(14,580.00)
Trf to Com Income					
64536	Other Fees/Charges	(4,048.94)	(4,111.00)	(4,200.00)	(4,900.00)
		(4,048.94)	(4,111.00)	(4,200.00)	(4,900.00)
Grand Total					
		(48,476.85)	(39,466.84)	(34,320.00)	(44,420.00)

Archive Income

Income Description	Actual 2012-13 £	Actual 2013-14 £	Actual 2014-15 £	Forecast 2015-16 £
Donations	(40.81)	(57.22)	(591.72)	(600.00)
Contributions from other local authoriti		(4,000.00)		
Purchase of Books Income		(4.00)	(2.50)	-
Publications	(746.19)	(663.30)	(442.06)	(500.00)
Fees and charges	(719.25)	(504.98)	(394.71)	(500.00)
Agency Sales	(54.18)	(21.68)	-	-
Presentations	(29.17)	(49.17)	(83.33)	-
Income From Photocopying	(321.08)	(327.49)	(545.92)	(500.00)
Print Outs	(1,526.28)	(1,394.85)	(1,475.95)	(1,500.00)
Postages	(4.86)	(2.55)	(12.16)	(20.00)
Under Or Over Bankings	40.61	49.34	(4.50)	-
Hire of Rooms	(35.00)			
Photograph Fees	(467.92)	(432.89)	(364.99)	(350.00)
	(3,904.13)	(7,408.79)	(3,917.84)	(3,970.00)

