

Staffordshire and Stoke-on-Trent Joint Archives Committee

Thursday 25 February 2021

10:30

Meeting to be conducted using Microsoft Teams - Microsoft Teams

NB. Attendance by the public and press is via webcast only which can be viewed here - <https://staffordshire.public-i.tv/core/portal/home>

Members are requested to join the Teams meeting through the Outlook calendar booking (click "Join Microsoft Teams Meeting").

Also, please ensure Laptops/Tablets are fully charged prior to the commencement of the meeting.

John Tradewell
Director of Corporate Services
17 February 2021

A G E N D A

1. **Apologies**
2. **Declarations of Interest in accordance with Standing Order 16**
3. **Minutes of meeting held on 12 November 2020** (Pages 1 - 6)
4. **Review of Forward Plan 2021** (Pages 7 - 24)

Joint Report of the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council)

5. **Staffordshire and Stoke on Trent Archive Service: Impact of COVID-19 on the Service** (Pages 25 - 32)

Joint report of the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council)

6. **Predicted Outturn 2019/21 and 2021/22 Revenue Budget** (Pages 33 - 42)

Joint report of the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council)

7. Staffordshire History Centre Project - Update (Pages 43 - 48)

Joint report of the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council)

8. Staffordshire and Stoke on Trent Archive Service: Tamworth Castle Archive (Pages 49 - 52)

Joint report of the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council)

9. Date of next meeting - Thursday 10 June 2021 at 10.30 am, Virtual/on-line (provisional)

10. Exclusion of the public

The Chairman to move:-

“That the public be excluded from the meeting for the following items of business which involve the likely disclosure of exempt information as defined in the paragraphs of Part 1 of Schedule 12A (as amended) of the Local Government Act 1972 indicated below”.

PART TWO

(All reports in this section are on pink paper)

11. Exempt minutes of meeting held on 12 November 2020 (Pages 53 - 54)

(exemption paragraphs 2 and 3)

Membership	
Gill Burnett	Victoria Wilson
Lorraine Beardmore	

Minutes of the Staffordshire and Stoke-on-Trent Joint Archives Committee meeting held on 12 November 2020

Present: Mike Davies (Invitee/Observer), Gill Burnett, Lorraine Beardmore and Victoria Wilson

PART ONE

1. Appointment of Chairman and Vice-Chairman

RESOLVED – (a) That Councillor L. Beardmore be appointed Chairman for the ensuing year until the next Annual Meeting in June 2021.

(b) That Councillor Mrs. V. Wilson be appointed Vice-Chairman for the ensuing year until the next Annual Meeting in June 2021.

2. Declarations of Interest in accordance with Standing Order 16

There were no Declarations of Interest made.

3. Minutes of the meeting held on 23 June 2020

RESOLVED – That the minutes of the meeting held on 23 June 2020 be confirmed and signed by the Chairman.

4. Predicted Outturn 2020/21

The Committee considered a joint report of the Director of Corporate Services and City Director of Housing and Community Services setting out the predicted outturn for 2020/21 (Schedule 1 to the signed minutes).

Members noted that a spend of £788,133 was predicted against an approved budget of £613,830 which, if realised, would result in a net overspend of £174,303 comprising core services (£72,279) and Staffordshire County Council Sites and Public Services (£102,024). Whilst this overspend also included a net transfer of £37,200 from reserves, it would be met by the County Council, if necessary.

With regard to the General Reserve, the current forecast was a balance of £69,160 at year end. This assumed a transfer of £37,200 net underspend from Stoke-on-Trent City Council (referred to above) and payment of £251,000 towards match funding for the Staffordshire History Centre Project.

They also noted a balance of 57,547 expected in the Archive Acquisition reserve.

RESOLVED – (a) That the report be received and noted.

(b) That £251,000 match funding for the Staffordshire History Centre Project be committed from the General Reserve.

5. Review of Fees and Charges

The Committee considered a joint report of the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and the Director of Housing and Community Services (Stoke-on-Trent City Council) regarding a review of the Joint Archive Service's fees and charges for 2021/22 (Schedule 2 to the signed minutes).

Members noted that the Archive Service's fees and charges were reviewed on an annual basis to ensure that they reflected changes in demand and costs of providing the various services available in terms of staff time, equipment and travelling. In addition, account was taken of the prevailing economic climate and the availability of the on-line service offer.

For 2021/22 it was proposed that fees charges for the Research Offer should remain unchanged. However, it was proposed to simplify the structure of fees and charges for the supply of copies, in order to better reflect the time spent by staff in providing the service. The current price differential between copies ordered in the Reading Room at Staffordshire Record Office and those ordered on-line was to remain in place. However, this was for the first copy only, with remaining copies being charged at the same rate as those ordered in the Reading Room. In addition, it was proposed to remove the price differential between black and white and colour copies by introducing a single charge of £1.50 to reflect that the majority of orders were now fulfilled on-line and to make estimates easier to provide.

No change was proposed to fees and charges for talks and visits, owing to demand having dropped significantly during the Covid-19 Pandemic and in recognition of the current low rate in the Retail Price Index.

RESOLVED – (a) That the report be received and noted.

(b) That the revised schedule of fees and charges set out in Appendix 2 to the report be approved for introduction by the Joint Archive Service from 1 April 2021.

6. Staffordshire History Centre Project - Update

The Committee considered a report by the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council) updating them on progress with regard to the Staffordshire History Centre (SHC) Project (Schedule 3 to the signed minutes).

Considerable progress had been made in the Audience Research strand of the project including completion of an online survey in May and June 2020 in order to:- (i) understand motivations for visiting; (ii) identify key market drivers and barriers to visiting and; (iii) understand more about users and other cultural venues they visited, which received a total of 440 responses from all age groups. Whilst most respondents were found to be from Staffordshire and Stoke on Trent, 69% were female and approximately half had visited the service previously.

The Staffordshire Record Office was found to be the most frequently visited site with family and local history being the key motivation. Most people had discovered the service through publication of the regular newsletter (which had included a link to the survey) or Facebook page. High social media usage was found amongst visitors with the main reasons being given as, “to keep up to date with talks and events” and “to see behind the scenes images of documents and objects”. Whilst 46% of respondents planned to visit the service in the future, the main barriers were found to include lack of free time or awareness of the service offer. Little reference was made by respondents to accessing exhibitions or events.

In addition, two online focus groups had been recruited with the aim of gaining a better understanding of motivations for heritage attendance, expectations and preferences/perceptions and to test the proposals for Staffordshire History Centre. The two groups expressed interest in exhibitions and events relating to the Staffordshire Hoard and pottery industries and also suggested other themes for the future initiatives. Views about the Staffordshire History Centre, William Salt Library and talks and tours were very positive and there was high demand for expansion of the digital offer.

The results of the above audience research work were being used by the contractor to develop a Marketing Strategy for the Staffordshire History Centre.

Research undertaken in connection with the Learning strand had also been completed. A survey of local teachers had elicited 31 responses with the following common themes about the offer emerging:- (i) needs to enhance, enrich and be relevant to, the school curriculum; (ii) requires pupils to put their learning into context; (iii) essential to be child-friendly and appealing to pupils and teachers alike; (iv) must be inclusive and accessible to all; (v) needs to offer hands-on engagement for pupils; (vi) must be something that the school cannot (or is unable to) provide easily; (vii) venue and activities should encourage ‘awe and wonder’ in pupils and; (viii) Offers value for money. Teachers were also asked for their opinion about the single most important item the Staffordshire History Centre should offer and the responses received included:- (i) interaction with real objects and archive material; (ii) must be fun, interactive and hands-on; (iii) help to explain change over time; (iv) bring history to life; (iv) encourage pride in Local history; (v) offer something that can’t be done in school; (vi) provide new experiences and; (vii) offer a range of activities.

The consultant had also contacted various potential partner organisations (public and private sector) for delivery of learning activities. Although responses had been positive, further progress had been prevented by the Covid-19 pandemic. However, seven ‘virtual’ learning sessions had been written using images from Staffordshire Archives and Heritage collections including:- (i) Mystery Staffordshire Objects; (ii) Staffordshire Timeline; (iii) Staffordshire Portraits; (iv) Victorian Stafford Gaol; (v) Discover Your Local Area; (vi) Design Your Own Manuscript and (vii) Create Your Own Coat of Arms, all of which had been made available to teachers during the March-July 2020 national lockdown.

With regard to the Design and Implementation strand, consultants had been recommissioned to update the design report and Implementation Plan, there had been new work on increasing biodiversity within the garden at the site and an ecology report on the current habitat and also been requested.

Progress had also been made on updating the Business Plan using information gained from the Audience and Learning research activity. The Evaluation Plan would be renewed once the Activity Plan was almost complete.

Work had resumed on repackaging and cataloguing the William Salt Library collection prior to its relocation, with support from the Collections Assistant.

Funding approval had been sought from the County Council to extend the storage capacity of the History Centre from two floors to four floors. This would enable the service to operate from one site and provide storage space for an estimated 55 years. Although Planning Permission had yet to be obtained, Stafford Borough Council were supportive of the proposals.

Following this decision, the County Council's capital contribution had increased to £1.894m, which meant that the grant percentage for the project has reduced from 75% to 63%. The design proposals were to be updated and presented to the NHLF at the mid-stage review on 10 December 2020.

During the discussion which ensued, Members welcomed news of the progress which had been made in spite of the pandemic and paid tribute to the Deputy Chief Executive and Director for their work in promoting this exciting project for the benefit of residents of Staffordshire.

RESOLVED – That the report be received and noted.

7. Date of next meeting - 25 February 2021 at 10.30 am, Venue to be Confirmed

RESOLVED – (a) That the date and time of the next meeting be noted.

(b) That Members be notified of the venue for the next meeting once further details are known.

8. Exclusion of the public

RESOLVED – That the public be excluded from the meeting for the following items of business which involve the likely disclosure of exempt information as defined in the paragraphs of Part 1 of schedule 12A (as amended) of the local Government Act 1972 indicated below”.

PART TWO

9. Archives and Heritage Service Restructure - Update

(exemption paragraphs 2 and 3)

The Committee received an exempt joint report of the Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council) regarding the

restructure of the Archives and Heritage Service and noted the progress which had been made.

10. Relocation of Stoke-on-Trent City Archives - Update

(exemption paragraphs 2 and 3)

The Committee received an exempt oral joint report of the Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council) updating them on the progress made with regard to the relocation of Stoke-on-Trent City Archives.

Chairman

Members Interest
N/A

Staffordshire and Stoke on Trent Joint Archive Committee 25 February 2021

Review of Forward Plan 2021

Recommendation(s)

1. That the Committee approve the review of the Forward Plan for the Service and note progress so far.

Report of Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke on Trent City Council)

Reasons for Recommendations

Background

2. The Joint Archive Service has worked to a three-year planning cycle since its inception in 1997. In 2015 the scope of the plan was extended to ten years to encompass significant transformation of the service which would take longer than three years to deliver. The ten-year Plan was reviewed in 2018 and has been updated in 2021 to reflect progress made so far.

3. The 2015-2018 plan was developed with stakeholders, partners, and Friends groups. Public consultation informed the themes of the plan and it was approved by the Joint Archive Committee on 26 March 2015. The second review was approved on 3 April 2018.

4. The 2021 updated Forward Plan covers the County Council's Joint Archive Service and the Museum Service Together the services are known as 'Archives and Heritage'. The ten-year Plan has been reviewed and updated to reflect progress made so far. A summary of progress for 2018-2021 is given below and the amendments for the following three years. The revised Plan is at Appendix 2.

Background, partners and context headlines

5. The list of key partners has been reviewed and expanded to include Staffordshire, Liverpool and Nottingham Universities as projects and placements have taken place with these institutions. Stafford College has been added to reflect planned activity for the Staffordshire History Centre project which will include delivery of learning sessions and placements. Ceramics collector groups have become important partners for Stoke on Trent City Archives supporting conservation and repair of collections such as the Shelley Group. The Hub at St Mary's Lichfield is a key partner for the delivery of the History Access Point in Lichfield. Our Friends and volunteer groups continue to deliver support for our service and the impact of COVID-19 on their numbers and working remotely has been included.

6. The context headlines have been updated and expanded to include the project vision, aims and objectives for the Staffordshire History Centre. This project was a direct response to the vision. A round two application to the National Lottery Heritage Fund for £3.9m of funding will be submitted by 1 March 2021 with a decision due in June.

7. The graphic with the service points has been updated to include the Lichfield History Access Point (HAP) which opened in December 2018. The HAP includes local history books, microform and online resources within a space in Lichfield Library at St Mary's.

8. Information on the collections, buildings, outreach, volunteers, partnerships and resources has been updated with current statistics and key achievements. This includes increasing online access to resources such as Find My Past, Staffordshire Past Track and Staffordshire Name Indexes

Vision and mission statement

9. The vision and mission statement remain current for the service and complements the one developed for the SHC project.

Developing an Active Partnership approach

10. The partnership between the Archives and Heritage Service and William Salt Library Trust is strong and they remain committed to the shared vision for the Staffordshire History Centre project.

11. Further consultation and audience research has taken place during 2019-2020 to strengthen and confirm plans for the Staffordshire History Centre. This activity included:

- Stakeholder meetings and discussion with Friends groups prior to submission of the round 1 application.
- Consultation with partners on the digital offer
- Audience research survey May-June 2020 followed up with focus groups on Zoom.
- Learning online survey followed up with Zoom focus groups for potential delivery with partners.
- Piloting digital learning materials with schools.

In total 537 participants took part in consultation organised by the service.

12. Engagement with volunteers peaked at 135 in March 2020 however it was then impacted by COVID-19. During subsequent lockdowns 45 people continued to volunteer remotely working on materials copied by staff or completing research for blogs. This has been difficult to sustain both in terms of staff time for copying material and effectively engaging volunteers who are reluctant to use new technology. A variety of approaches is used including: email, Facebook groups, Zoom, and telephone calls. Face to face volunteer offers valuable social interaction which is missing for people during current restrictions.

13. Plans for the Staffordshire History Centre include new roles for volunteers supporting delivery of the Activity Plan. As part of the plans 102 volunteers will be trained and an estimated 4,803 days will be contributed at a value of £721,050 over the 4 years of the life of the project.

14. Key priorities for this area will be recovering face to face volunteering onsite once COVID-19 restrictions have eased. Recruitment of volunteers and development of a new network for the Staffordshire History Centre project are also key priorities. The text in this section of the plan has been slightly changed to emphasise delivery in the next phase of work.

Resilience and sustainability

15. The major achievement for resilience and sustainability is the submission of the National Lottery Heritage Fund round 1 application and the work to complete the round two application in March. In addition a service review has been completed to re-organise the workforce to meet the service vision to deliver MTFS savings and financial sustainability.

16. During the COVID-19 national lockdown cataloguing and indexing by staff and volunteers has continued. All Staffordshire Record Office collections now have some description on Gateway (which is a major achievement for Archive Service Accreditation). Volunteers have made substantial progress with indexing of wills and the Bawdy Courts project resulting in new additions for the Staffordshire Name Indexes website.

17. External funding for the Asylums and Bawdy Courts projects was extended into Spring to enable both to catch-up following the first COVID-19 lockdown. Both projects have attracted Collaborative Doctoral Award funding which enables PhD students to support the projects. This gives additional resource for three years beyond the timeframe of the initial grants and increases impact.

18. Throughout 2020 we developed a business case to review the storage provision within the County Service taking account of an internal review of storage. This business case looked at options to increase the storage at the History Centre from two to four floors and to facilitate the move of material from our outstore into the new facility. The costs have been modelled and it was formally approved by Cabinet on 17 February 2021.

19. There have been no changes made to the text of this section of the plan. The emphasis will be on securing grant funding to deliver the next phase of work.

Reaching and engaging new audiences

20. The key achievements in this section included the completion of the First World War Centenary programme concluding with the final conference in 2019. This five-year programme of activity delivered:

- Ten conferences with 478 attendees in total
- Sixteen Staffordshire County Council supported projects
- £255,000 of external funding

- Over 373,000 people were engaged

21. Plans for the activities to be delivered in the Staffordshire History Centre project have been tested and piloted. This has included several touring exhibitions:

- The Arts Council England funded touring exhibition 'Through the Eyes of a Child' which reached over 26,000 visitors.
- The Ancient High House in Stafford hosted our 'Retail Revisited' exhibition between October 2019 and January 2020.
- We put on our first exhibition 'Distinctive Staffordshire' at the Staffordshire Record Office in the summer of 2019.
- Delivery of 'Lockdown Memories' contemporary collecting and on-line engagement 2020-21

22. A new exhibition was also planned for spring 2020. A volunteer group was established to research the content and contribute blog posts about their discoveries. In addition, we set up a series of events that would run throughout the exhibition. Following its launch on 7th March 2020 the exhibition closed as a result of the COVID-19 lockdown and restrictions. The learning from development of this and previous exhibitions contributed to the revised Activity and Interpretation Plans.

23. Using the audience research and consultation (see point 11 above) the Activity and Interpretation Plans for the Staffordshire History Centre project have been substantially reviewed and rewritten. The plans cover a four-year programme including reaching new audiences through outreach events and community projects. The Interpretation Plan outlines how collections will be viewed at exhibitions both onsite at the SHC and through touring exhibitions. A Marketing Plan for the History Centre has been developed alongside a Business Plan for the project.

24. This section of the Forward Plan has been substantially revised and simplified. Sitting beneath it are detailed plans for implementation of the activity and interpretation programmes of work.

Sharing knowledge across the sector

25. The Archive and Heritage Service contributes to the wider sector working with several different organisations. It is an active member of Archives West Midlands with two county council staff as trustees including Chair of AWM. Members of staff have presented at two conferences during the year to an academic conference and to the Rural Museum Network.

26. The service has delivered the Wellcome Trust funded Asylums project which has shared knowledge across academics, volunteers and wider communities both within and beyond Staffordshire and Stoke on Trent.

27. This section of the plan remains unchanged with further opportunities to share knowledge and develop case studies arising from future grant funded projects.

Online presence and remote access

28. There has been substantial progress on the development of an online presence and delivery of remote access for the service. The key achievements include:

- Joining Dorset-led consortium for purchase of Preservica, digital preservation system for born-digital archives and other digital objects
- Addition of c.60,000 catalogue records to Gateway to the Past online catalogue, with emphasis on the William Salt Library and former Lichfield Record Office collections
- Six new or extended indexes added to the Staffordshire Name Indexes website
- Developed innovative digital engagement with volunteers during the pandemic such as the Learning Room site.
- Developed a plan for the new website, integrating online catalogue, blogs, events programme with ticket sales, online shop, local studies resources, and user-generated content in consultation with stakeholders.

29. This section of the plan has not been revised with the key emphasis being on delivery of the new website in the next phase.

The year ahead

30. The plans for 2021/2022 are focussed upon recovering the service from the impact of COVID-19. Key to this will be recovering face to face engagement and re-establishing onsite volunteering. This will include using a variety of methods of engagement (online, video, newsletters) to restore confidence in face to face contact. Risk assessments will be reviewed to ensure the service is supporting volunteers and visitors encouraging them to visit our COVID secure spaces.

31. The other key areas of activity will be securing external funding to deliver the Staffordshire History Centre project. Depending on the outcome of the application to the Heritage Fund the service will implement the project or review it to deliver an alternative option. The Service will also implement the new staffing structure for the County Service.

Appendix 1

Equalities implications:

A wide range of stakeholders have been engaged in development of planned activities for the externally funded Staffordshire History Centre project.

Legal implications:

The Forward Plan is required under the terms of the terms of the Joint Agreement which is reviewed and amended as required by both authorities.

Resource and Value for money implications:

The delivery of the Staffordshire History Centre will enable the Archive and Heritage Service to achieve its MTFS savings and a sustainable model for the future.

Risk implications:

Some of the planned activity is dependent on external funding. A Fundraising Strategy is in place for the Service. The impact of COVID-19 has been considerable, and it may take longer than anticipated to recover all aspects of onsite services. Future restrictions may also impact.

Climate Change implications:

The Forward Plan includes activities to promote online access as well as physical access to services and collections. This provides options for remote use and not necessarily travel to multiple locations. Any new buildings will be compliant with modern standards for energy efficiency and minimise impacts on climate change.

Health Impact Assessment screening:

The project offers opportunities for volunteers to get involved and add value to the service with support and accredited training programmes from staff. Volunteering provides many social benefits for individuals which can impact positively on health.

Report author:

Authors' Names: **Joanna Terry, Head of Archives & Heritage**

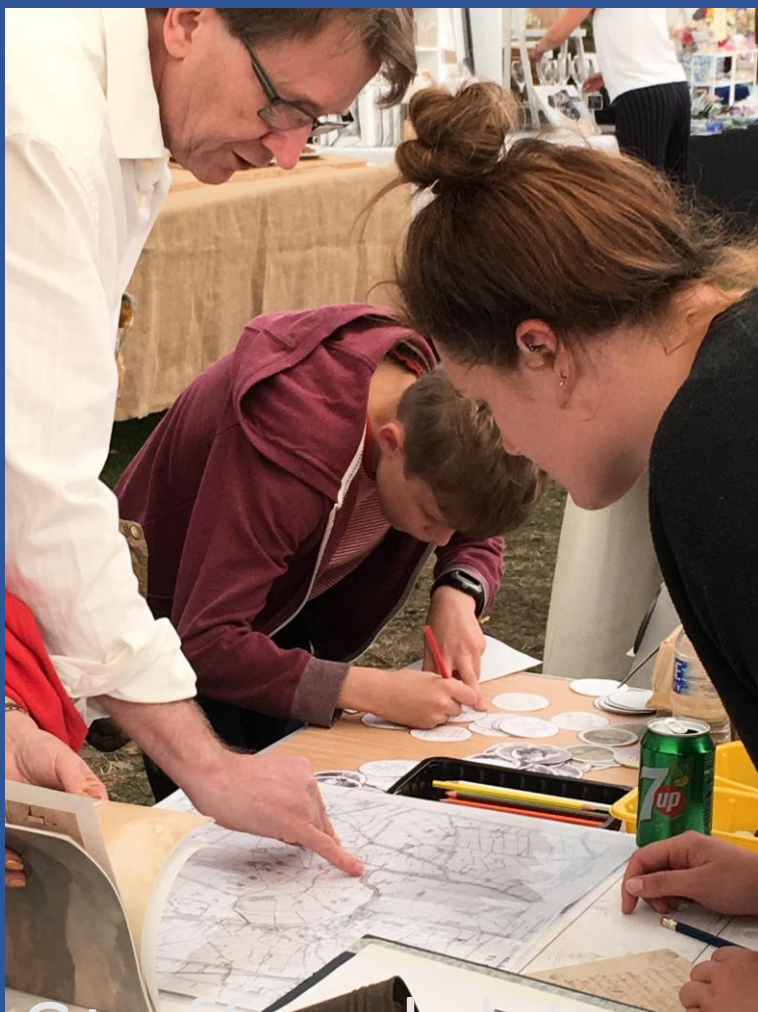
Telephone No: (01785) 278370

Room No: Staffordshire Record Office

List of Background Papers

Papers	Contact/Directorate/ext number
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Appendix 3 Staffordshire and Stoke on Trent Archive Service Vision



Staffordshire and Stoke on Trent Archive and Heritage Service Vision

A Vision for the Service 2015 – 2025 (reviewed Feb 2021)



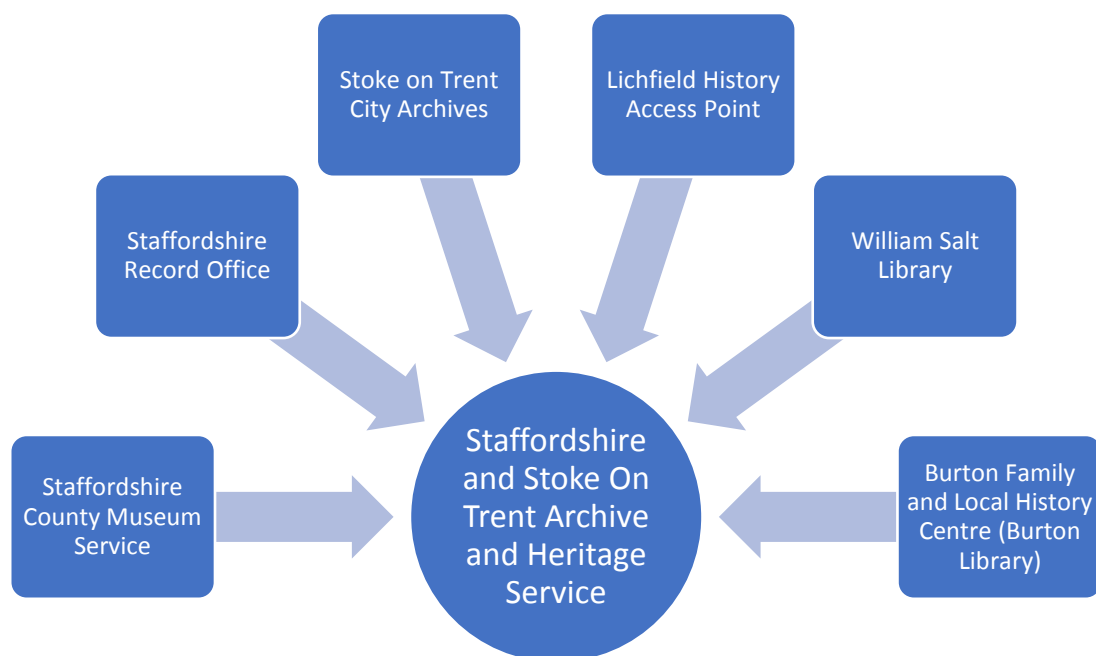
Staffordshire and Stoke on Trent Archives and Heritage Service Vision 2015 – reviewed 2021

Introduction

This vision for Staffordshire and Stoke on Trent Archives and Heritage Service was developed in 2015 to look ahead to what outcomes the Service wanted to achieved in 10 years' time. It is the result of our conversations with the users, staff and stakeholders of the service. It aims to bring together and develop the ideas, hopes and requirements these groups have discussed with us. It has been used as the the basis of further consultation and discussion. It is not yet a fully funded vision, but aims to reflect the likely future financial environment. The service is being redesigned and refocused to deliver some of these outcomes and is seeking additional funding to fully deliver this vision.

This vision is necessarily general and will inform detailed future plans such as annual plans and funding applications. It will also inform the work of partner organisations such as the William Salt Library Trust. The Trust's objectives are aligned to this vision and a Joint Venture agreement is in place for delivery of a major project with the Service

Who we are



The Archive and Heritage Service includes the Archive Service, jointly funded and managed by Staffordshire County Council and Stoke on Trent City Council, and the County Museum Service funded and managed by Staffordshire County Council. The William Salt Library is a charitable library owned and managed by the William Salt Library Trust. The County Council delivers the service and maintains the library building on behalf of the Trust. Together we care for the historic collections of the county and city.

Our Partners

The Archive and Heritage Service is itself a partnership and we work with other partners to deliver projects and services for residents of Staffordshire and Stoke on Trent. Our key internal local authority partners are:

- Library and Arts services in both authorities
- The Potteries Museum and Art Gallery within the City Council
- The Rural County within the County Council

- Tourism teams and Destination Management Partnership in both authorities
- Entrust

Our key external partners are:

- The William Salt Library Trust
- The Diocese of Lichfield
- Staffordshire Museums Consortium
- National Trust at Shugborough Estate
- Marches Museum Network
- Keele University
- Staffordshire University
- Liverpool University
- Nottingham University
- The Victoria County History
- Stafford College
- Ceramic collectors e.g. Shelley, Doulton
- Ironbridge Gorge Museums Trust
- Archives West Midlands
- The Hub at St Mary's Lichfield

We work with two Friends groups who fundraise for us:

- Friends of Staffordshire and Stoke on Trent Archives Service (FoSSA)
- Friends of the William Salt Library

We receive funding, advice and guidance from national bodies:

- The National Archives
- Arts Council England
- National Lottery Heritage Fund
- The Art Fund
- A range of other grant-awarding bodies

We receive support from approximately 130 volunteers to help us deliver our aims and outcomes. Numbers of volunteers has been impacted by COVID-19 resulting in 45 volunteers continuing to work with the Service remotely whilst restrictions are in place. We will work with our partners to ensure our vision and theirs are aligned and complementary to one another.

Context Headlines

Staffordshire History Centre

In 2016 the Service was awarded Stage 1 HLF funding for the Staffordshire History Centre Project. The project was developed from 2016-2018 with a stage 2 bid to be submitted in 2018 but unfortunately funding was not awarded. Following a review of options and feedback from the National Lottery Heritage Fund a new stage 1 application was submitted in May 2019 with an award of £36,000 of development funding in September 2019. A stage 2 application for £3.9m of funding is being submitted in March 2021

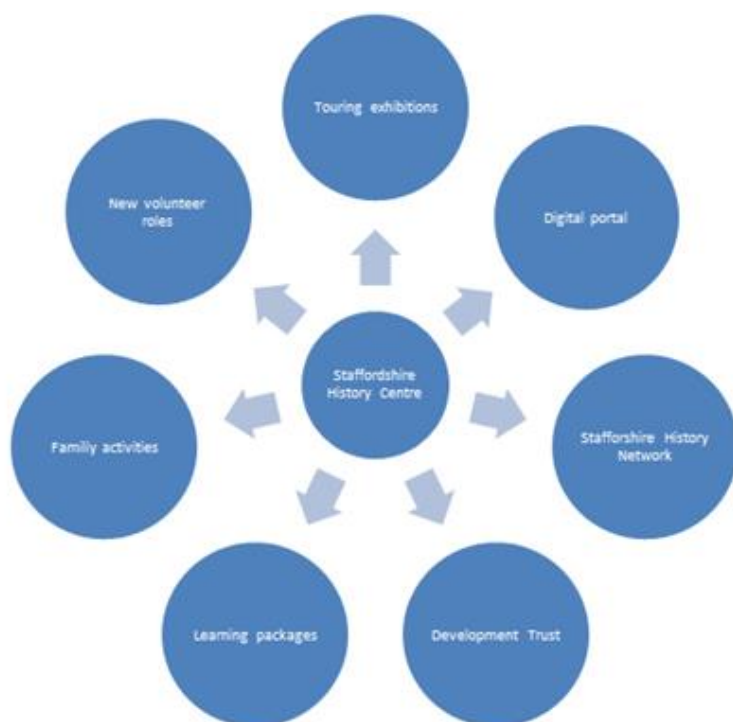
The vision for the Staffordshire History Centre is:

We will transform the offer for users and visitors so that you will experience:

- Shared stories of Staffordshire's places and people
- A showcase of our superb collections
- An imaginative and creative engagement programme
- An intuitive digital portal to access collections
- A sense of pride and local identity
- As a volunteer you will have a voice that shapes and informs the management, development and delivery of the SHC
- A warm, inclusive welcome in a fully accessible building
- A fun, enjoyable and rewarding experience that inspires learning and encourages repeat visits

In delivering the project we will also:

- Place learning at the heart of the project
- Reach out to and engage with new and diverse audiences
- Take an 'Active Partnership Approach' to working with local groups and volunteers
- Be a pivotal point for heritage, excellence and expertise across the county
- Invest to become more cost effective
- Be resilient and sustainable, securing the future of the collections and William Salt Library building
- Conserve our collections and improve accessibility through a high-quality service
- Be Covid-19 proof and resilient



Collections

- 5 miles of historic records from 10th to 21st centuries
- Nationally Outstanding Designated Archives
- Unique Special Collections of books in the grade 2 listed William Salt Library
- Archive storage rooms are full and we need more to continue collecting.
- Some library collections are not stored in the necessary environmental conditions
- 27,000 objects relating to Staffordshire's history over the past 250 years.
- 43,000 photographs
- 1,800 works of fine and decorative art.
- Our museum development programme provides support and advice for the County's 40+ museums.
- Two replacement museum stores have given extra capacity and all storage areas provide the necessary conditions for museum collections.

In our buildings

- 100% of users say they are satisfied with the Archive Service.
- The Archive Service achieved Accreditation in 2017.
- The Staffordshire County Museum has provisional accreditation pending the opening of the Staffordshire History Centre.
- Visitor facilities at record offices are in need of improvement e.g. limited toilets, poor break area, lack of space for volunteers.
- Our staffing resources have been reorganized around a whole service approach and delivering the Staffordshire History Centre project
- Fewer people are using the reading rooms as more use online services.
- People can see exhibitions about rural life and servants' lives at the Park Farm and servants' quarters on the Shugborough Estate (managed by the National Trust).

135,779 people experienced our 'Life of a Child' and 'On Your Doorstep' touring exhibitions in 2019-20

Beyond our buildings

- There is a single online catalogue for archive and museum collections called Gateway to the Past used by 21,205 visitors in 2019/20
- Around 4 million names and images from parish registers, wills and marriage bonds between 1538-1900 are available on the Find my Past family history website to explore. They were accessed by 88,584 researchers in 2019/20.
- 15,305 people used the Staffordshire Name Indexes website to research their family history. More names are added each year.
- In 2019/20 the service was used 1,085,369 times, 99% of this usage was outside the public spaces, mainly via the internet.
- The service is developing a programme of work with rural schools and reminiscence sessions with older people in care.
- 212,432 people browsed Staffordshire history at www.staffspasttrack.org.uk in 2019/20
- Community exhibitions tour across the county.
- 315,542 online engagements were achieved by people who explored the First World War on www.staffordshiregreatwar.com and social media 2016-2019. 775,623 visitors attended events and community projects supported by the service
- The service reaches more people outside its sites, via online services and activities in the community.

Volunteering and Partnership

- 135 volunteers provided 5,112 hours of support in 2019/20
- New projects continue to draw in further volunteers
- The service works in partnership with the Trustees and Friends of the William Salt Library and the Friends of the Archive Service.
- The service works with other museums and organisations to deliver projects such as the Staffordshire Great War Trail and West Midlands Museum Development programme.
- Local heritage groups work with us to produce exhibitions and activities.
- We work in partnership with the National Trust on the Shugborough Estate.

Resources

- Like all council services, the Archive and Heritage Service has had to make financial savings over the last few years. The service will deliver £300,000 savings in 2021/22.
- The service has enhanced its resources by attracting £105,000 grant funding from the National Lottery Heritage Fund, Arts Council England, The National Archives and other grant giving bodies in 2019-2020.

Staffordshire and Stoke on Trent Archives and Heritage Service Vision

Our vision:

Connecting people to the collected stories and heritage of Staffordshire, Stoke on Trent and beyond.

Our mission

To connect people to the memories of Staffordshire and Stoke on Trent, by engaging them with the collections we develop and preserve for current and future generations.

By 2025 the service will be a model archive and heritage service in terms of:

1. An active partnership approach.
2. Resilience and sustainability.
3. Reaching and engaging with a wide range of people and building new audiences.
4. Sharing knowledge across the UK.
5. Online presence and remote access.

We have developed five headline outcomes that we are looking to achieve in that period.

Staffordshire and Stoke on Trent Archives and Heritage Service is developed by an active partnership between Councils, users, depositors, partners, volunteers in all areas of the service including: funding, management and delivery.

Our planned activity includes:

- Valuing and respecting the involvement of our partners in our service and actively crediting their participation and identity
- Developing and strengthening existing partnerships with the Trustees of the William Salt Library, the Friends of the Staffordshire and Stoke on Trent Archive Service and the Friends of the William Salt Library
- Developing new partnerships with enthusiast and specialist interest groups in both the county and the city
- Empowering users and stakeholders to regularly contribute to the development of our policies and plans
- Creating a range of regular consultation activities such as teachers or user panels, which influence the service. Users feel they are involved in developing the service.
- Developing training and support for stakeholder fundraisers
- Delivering in and supporting volunteering and apprenticeship programmes in partnership with other providers
- Expanding the volunteer programme in terms of numbers and roles undertaken, to add value to the service alongside the professional staff team

By 2025 :

- Staffordshire and Stoke on Trent Councils will see the service as having the lead role to play in the county and city, caring for their historically-valuable collections, and enabling their enjoyment and use by residents and visitors alike, supporting health and wellbeing outcomes.
- The work of the service will be viewed as relevant to a wide range of organisations and individuals through joint delivery and commissioning of projects
- Fundraising by stakeholders has increased significantly

Staffordshire and Stoke on Trent Archives and Heritage Service has been re-shaped and redesigned to encourage resilience, new ways of working and refocusing its delivery to the needs of users.

Our planned activity includes:

- Ensuring that the service is financially solvent and stable, and/by increasing its mix of external funding
- Examining and developing new areas of income generation to support the service, together with stakeholders
- Ensuring the long-term security of collections through housing all collections in EN16893 compliant storage, housing collections in the best possible conditions, and having space to continue to collect for the next 20 years.
- Regularly reviewing collections development policies and taking a more strategic active approach to collections development, including deaccessioning and disposal

- Reviewing and improving our collections information to be more efficient and user-focused with an improved collections interface which allows people to contribute information. Volunteers playing an integral role, working with staff, to develop collections information. Online resources have strong indexes and catalogues to maximize access.
- Being more active in attracting new users and providing them with different opportunities to engage with collections
- Redesigning/developing buildings to allow us to provide the types of services required in a more cost-effective, sustainable way
- Providing a new means of engagement for users through a new exhibition space. Some exhibitions are co-created by users and stakeholder groups building on the existing work developed by the Museum Service.
- Delivering an outreach programme to take collections and resources out to communities beyond its main buildings.
- Strengthening our presence around the county by working with Active Partners, such as libraries and heritage groups, to deliver access points in existing community spaces, reaching more people
- There is a new focus on providing online resources and a rejuvenated online presence to reach more people, balanced with a programme to engage more people with the original documents
- We acknowledge that these new ways of working will need staff resources and training and will build on the expertise we have developed in our existing programmes to deliver a more joined-up, cross-disciplinary service.

By 2025:

- The service is housed in buildings which are accessible, welcoming and comfortable. The customer experience is warm, welcoming and inspiring. Users are easily able to use and engage with collections and share their knowledge.
- The service cares for and develops collections which reflect present and past life in Staffordshire and Stoke and are appraised to ensure they meet our collection policies.
- All collections are stored in compliance with sector standards.

Staffordshire and Stoke on Trent Archives and Heritage Service has diversified its users, stakeholders and collections. This has resulted in increased visibility and understanding of the service by the public and increased levels of new users. People are proud of the Staffordshire History Centre

Reaching and engaging with a wide range of people and building new audiences

Staffordshire and Stoke on Trent Archives and Heritage Service has diversified its users, stakeholders and collections. This has resulted in increased visibility and understanding of the service by the public and increased levels of new users. People are proud of the Staffordshire History Centre.

Our planned activity includes:

- Testing, developing and embedding new ways of engaging with people and new ways for them to engage with the collections across a range of subjects and disciplines

- Engaging with community groups and non-traditional users of the service, will generate opportunities for collecting and engagement
- Providing ways to browse the collections online and onsite through permanent and temporary exhibitions

By 2025:

- The service is THE focus for the history and collections of Staffordshire
- Collections have diversified
- The Service has increased its current numbers of researchers in the searchroom and promoted the use of original documents, and increased the number of users attending activities, browsing facilities and using the service online.
- The service has built on its support amongst local communities and increased the membership of Friends organisations and their active involvement with the Service.
- Public awareness of the diverse themes and treasures within the collection has grown, including that of the William Salt Library

Staffordshire and Stoke on Trent Archives and Heritage Service shares knowledge on new ways of working with other services

Our planned activity includes:

- Exploring new ways of working and sharing this with the wider archive and museum sectors, gaining further insight in response
- Developing a close relationship with voluntary sector organisations and providing the archive and museum sectors with support in developing volunteering programmes
- Reviewing and developing its income generation programme.
- Supporting and advising heritage groups across the county on their development
- Providing opportunities for its users to share their knowledge and experience with each other, and providing experts to share their knowledge with users both on-site and online

By 2025:

- The service acts as a national focus for sector knowledge in active partnerships, including volunteering, working with the National Archives, Arts Council England and the Archives and Records Association.
- The service supports other museums and organisations which hold objects and archives in their collections to ensure they are secure, accessible and sustainable.

Staffordshire and Stoke on Trent Archives Service and Heritage has increased its activity online and is delivering more services online.

Our planned activity includes:

- Developing user participation as a key aim of the service's online offer
- Digital content is seen as a 'way in' for new, non-traditional users.
- Providing new online resources and a rejuvenated online presence to reach more people on platforms that maximise access.
- Balancing online access with a recognition that access to original documents is still important to many users and that online access is not for everyone
- Developing a plan to manage and provide access to born digital archives.

- Developing a plan that provides digital access to as many user services as possible, is sustainable, and links virtual visits to physical visits
- Implementing a digitisation programme with priority given to items that cannot be physically accessible
- Providing access to as many user services as possible through a new web service
- Developing active partnerships with key heritage access points
- Engage with existing and new users and raising awareness of the relevance of archives through a strong use of social media

By 2025:

- The service has a presence on key sites beyond its own website, delivering regular content to users on the sites they use frequently.
- More services are delivered online and more collections are available online.
- Born digital archives are properly managed and accessible.

Delivering the Vision

We have tested our draft Vision by consulting our stakeholders, partners, Friends groups, and users through a community conversation in February 2015. The feedback we received gave the vision broad support, with some amendments made in response to the conversation findings. The amended vision was approved in March 2015 by the Staffordshire and Stoke on Trent Joint Archive Committee.

To deliver the vision by 2025 we will have :

- Developed options for how we will use our buildings to secure our collections
- Sought funding to increase access and engagement with our collections by redesigning buildings and creating activity programmes to attract a broader range of users.
- Used new and existing partnerships to increase funding, expertise and resources for the service to reduce dependency on council funds.
- Evaluated our progress and produced case studies to share our learning, in our aim to become a recognised leader in our sector for active partnership.
- Increased the number and types of volunteers who work alongside our professional staff and produced training programmes for them.
- Delivered a strong online presence to engage users, offer services, and generate income for the service.
- Ensured the resilience of the service for the future.

The Archive and Heritage Service will update this Plan annually and undertake a full review every three years. (Reviewed February 2021, next review 2024).

Members Interest
N/A

Staffordshire and Stoke on Trent Joint Archive Committee 25 February 2021

Staffordshire and Stoke on Trent Archive Service: Impact of COVID-19 on the Service

Recommendation(s)

1. That the committee notes the report updating on the impact of COVID-19 and plans for recovery of onsite services.

Report of Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke on Trent City Council)

Reasons for Recommendations

Summary

2. On 23 June 2020 a report was brought to the Joint Archives Committee on the impact of COVID-19 upon the Archive Service. This report updates members on how the service has continued to operate and respond to demands during varying social distancing restrictions.

3. The impact has had negative and positive outcomes, as closure of onsite services meant access to collections was withdrawn and face to face engagement and contact with users ceased. Following reopening of onsite services balancing online engagement has been more difficult but has continued ensuring access to collections.

Recovery of onsite services

4. Plans for recovering onsite services began during May 2020 using national government guidance, sector guidance published by The National Archives, sharing ideas with other archive services through Archives West Midlands and advice from the two authorities' health and safety teams.

5. A key part of planning to recover and reopen the service to visitors was early staff engagement. Discussions with staff informed the development of an issues log each issue was worked through and solutions/ mitigations were identified. This information fed into the service recovery plan and risk assessment using corporate templates. The first phase recovery was enabling staff to return to COVID secure offices with guidance and PPE available to support access. Staffordshire Record Office, William Salt Library and the County Museum offices were reopened to staff from 15 June onwards. Stoke on Trent City Archives was reopened to staff from 22 June 2020.

6. However ,not all sites could be reopened to visitors. The William Salt Library is a grade II* listed building with small rooms and difficult access routes. In agreement with

the William Salt Library Trust this building has not reopened to visitors and the collection has been made available for use in Staffordshire Record Office.

7. Stoke on Trent City Archives and Lichfield History Access Point have not yet reopened to visitors. Both services are within a shared building making access more complex to plan for safe use. Stoke on Trent City Archives has had some staffing issues as two staff retired at the end of March 2020. These vacancies will have been filled by early April. A further member of staff retires at the end of March, so that vacancy will then need to be filled, interim plans are being worked out and a detailed recovery plan has been developed to enable the City Archives to reopen to visitors once the current lockdown ends and then plan receives corporate approval. Plans are in place re reopen the Lichfield History Access Point when current restrictions are eased to permit visitors within St Mary's.

8. Staffordshire Record Office was reopened to the public on 14th July 2020. All visits were by appointment only and required advance notice to order documents. Capacity in the searchroom reduced by 75% to increase space for social distancing. Screens and hand sanitiser were made available and since August staff and visitors have been required to wear face masks.

9. The service website has been regularly updated with current restrictions, guidance on planning a visit and promotion of the service reopening. In addition a reopening route map was shared on social media, welcome back posters and training for staff on implementing the new procedures. A YouTube video was created to familiarise people on what to expect when visiting the service.

10. The response to reopening the onsite service was positive though personal visitor numbers have varied. Up to 29 December 2020 the service has been able to open for just 21 weeks taking account of the November and current lockdown. The service has received 168 out of a possible 260 visitors averaging a 65% occupancy rate. The highest occupancy rate was during July and August at 87% until compulsory face coverings were introduced when it dropped to 65%. Comments from visitors have been very positive and appreciative of access onsite:

- *thank you so much for being so helpful. Staffordshire Record Office, always come up trumps :) who knows, I may be back asking more questions :) Have a lovely day, keep safe and well.*
- *Thank you very very much,very emotional,made my day*
- *thank you, thank you, thank you. I will certainly do as you say. It is so good to receive support from someone with such experience even if inexperience and experience come to the same conclusions!*
- *Thank you very much for helping out with information. Whilst doing this research into long-deceased relatives, it's sometimes nice to have contact with real living people!*

Recovering remote services

11. Once staff were able to return to offices from June this enabled more remote services to be delivered. Copying, photography and research services were offered as an alternative to visiting in person. A limited service was available during the first national lockdown however demand increased once the onsite service reopening was publicised.

12. Enquiries increased by 84% in July (compared to 2019) as visitors contacted the service about accessing collections in person or for an order. This stabilised at an average of 14% increase up to December 2020. Remote orders increased significantly once they could be processed. On average there is a 17% increase since June and overall a 4% increase compared to 2019.

Maintaining online engagement

13. During the temporary closure, the service focused upon increasing the output of social media, setting up a new volunteers' blog [The Learning Room](#), and producing two newsletters per month instead of one. Our online [Palaeography class](#) with Jim Sutton, a lecturer at the Keele Latin Summer school, has continued. Jim sends us examples for people to work on and provides individual feedback on their transcripts. We have also added blog pieces ourselves on how to use our sites, such as [Staffordshire Pastrack](#), guides to maps online, recent accessions and features by local libraries and the County Archaeologist in the [Guide to Research](#) section. Volunteers have continued to send in blog pieces about the history of gardening and other themes. Prof. Alannah Tomkins from [Keele University](#), had been contributing each week with blog posts about the [social history of medicine between 1628 and 1886](#), this has stopped due to time pressures. The blog on English Place-names with the [Institute for Name-Studies](#) at Nottingham University has also stopped, we hope to get this set up again later this year. The Learning Room blog has generated 5,205 views since June. As the first lockdown began the Minton Archive Twitter account started a "tweeted history" of the Minton company adapted from a detailed manuscript held in the collection. These daily tweets eventually ran all the way until September, generating just over 146,000 impressions from a total of 333 tweets. For those not on Twitter 25 weekly "round-up" blog posts brought together the previous 7 days' worth of tweets (with the added benefit of making all the tweets searchable from within the Minton Archive site). The long-standing monthly "Folio Friday" series continued, and the site's anniversary update - which usually comprises a large catalogue update/feature launch - was this year spread out over 3 months & concentrated on multiple smaller updates instead. In 2021 a new "Folio Frivolity" series of daily tweets, which highlight artwork from the Archive's folios, began and round-ups – this time fortnightly - were once again put together for the blog. These are ongoing and are planned to continue into the summer of 2021.

14. We have continued to maintain work on two externally funded projects having gained extensions to complete both projects. The [Staffordshire's Asylums](#) project blog has remained active with weekly posts over lockdown with input from volunteers and Lucy Smith, collaborative doctoral award PhD student at Keele. The Blog has

generated many enquiries about access to patient case records, and has encouraged engagement with the collection. The themes have ranged from gardening to learning disabilities, as well as stress and anxiety. Mental health themes have chimed with the public throughout lockdown. The blog has generated views 10,560 views since June.

15. The [Bawdy Courts of Lichfield](#) blog research group which met at the History Access Point now meets on MS Teams and posts have gone out weekly. The blog group was joined in September by Susie Johns, who has a 3-year post with us on a collaborative doctoral award studentship, again with Keele University. Susie will be taking over the blog as part of her PhD work next month. The blog has generated 4,443 views since June.

16. Maintaining increased engagement whilst recovering onsite services has been difficult. Updated statistics still show an increase compared to the previous year:

- Twitter impressions up 58%
- Facebook reach up 36%
- Staffordshire Past Track views up 79%
- Engagement is much more interactive with users commenting more frequently

17. The new YouTube channel which was setup for the [Staffordshire History Centre](#) with launch of content timed for Staffordshire Day on 1 May has had four more videos posted. The channel has received 1,148 views since its launch.

Volunteers and collections

18. Maintaining contact with volunteers has been challenging. 135 volunteers supported the service in 2019-2020. 45 continued to work with the team from April 2020. Staff provided copies of materials and tried several methods to keep in touch: email, Facebook group, telephone, and Zoom meetings. 20 remain active and it is clear that social face to face interaction is key for volunteers. The service will focus on re-engaging volunteers once restrictions permit.

19. All staff were supported to work at home, and this enabled progress to be made on collections work and increasing information in the online catalogue. Staff were able to input information from paper catalogues and expanding some series descriptions. This means over 16,000 new entries had been added from well over 700 separate accessions, representing nearly 500 boxes in terms of bulk. In addition, work continued adding a collection level description for uncatalogued accessions of which we are now at over 99%. Some of this work has been done by collection volunteers (over 2,600 entries). Increased information in the online catalogue enables wider access to collections both onsite or through our remote services.

Lockdown Memories

20. The Archives and Heritage Service in partnership with Staffordshire Library Service have engaged with people from across the county to create a lasting record of the Covid-19 pandemic within Staffordshire.. 'Lockdown Memories' explores the impact of the pandemic and lockdown measures upon the lives of Staffordshire people and communities.

21. In August we launched an online questionnaire asking for people's stories and testimonies about their experiences; from working on frontline services, coping with self-isolation or social distancing, helping to support neighbours or exploring new places in their local area during daily lockdown walks. Schools, local history groups and people of all ages have contributed, offering to donate photographs, drawings and documents relating to lockdown. To date we have received 128 responses. The finished artwork, donated items, memories and poems will form part of a 'Lockdown Memories' exhibition to take place once restrictions have eased. A similar online appeal 'Collecting during Coronavirus' was launched in June by Stoke-on-Trent City Archives and Stoke-on-Trent's Museum Service.

22. A successful bid to the West Midlands Museum Development Recovery Grants scheme enabled us to work with a poet, Mel Woodend, and a visual artist, Jhinuk Sarkar, to run a series of workshops in late 2020. Using Zoom, the workshops involved a wide range of people working to create poems and 'memory maps' based on their experiences of lockdown. These will be produced in digital format and will be made available on our online platforms in February and March 2021. A planned follow-on digital creative writing project has been postponed due to the return of lockdown in January 2021, however this will involve working with three schools to produce poetry based on the students' experiences which they will perform and will be shared as video clips.

Impact

23. The impact on the service has been both negative and positive. The reduction in onsite visitors has been very significant and has affected income with an estimated 25% reduction forecast. The loss of onsite volunteering and engagement activities has also been difficult for both the service and its volunteers. Whilst contact has been maintained the service will need to recruit and re-engage volunteers once restrictions ease. The age range of volunteers is predominantly over 65 and this group may be cautious in returning to group gatherings though it is clear the social interaction has been missed.

24. Online activity and engagement has increased though this has been difficult to maintain whilst also recovering physical and remote services. Externally funded projects have been delivered after negotiating extensions to enable project outcomes to be met. These projects have generated successful blogs and the Asylums project has particularly resonated with people during this time.

24. Staff adapted to working from home very well and refocused priorities on increasing information about collections online. The planned restructure of the service was delayed but is now being implemented.

Next steps

25. The immediate priority is the resumption of onsite services at Staffordshire Record Office and reopening Stoke on Trent City Archives once the recovery plan is approved.

26. The Service will continue to maintain digital engagement to support volunteers, engage people who are still self-isolating, and support recovery of remote services.

Plans will continue to be developed for the return of volunteers to the onsite service when restrictions ease. During the spring a digital exhibition is planned and online talks for Staffordshire Day 2021.

Appendix 1

Equalities implications:

Access to the service is now impacted by an individual's ability to access online resources. Access to Find My Past is available for service volunteers and the Library Service has access to Ancestry for registered library users. Resumption of onsite services will enable wider access where digital access is not an option.

Legal implications:

The Service continued to respond to enquiries ensuring compliance with information legislation.

Resource and Value for money implications:

The suspension of services has impacted on income with a 25% reduction estimated. It has also delayed the delivery of MTFs savings for Staffordshire County Council though this has been covered by the COVID-19 grant received by the Council.

Risk implications:

There was a risk that externally funded projects could be delayed but this has been mitigated through constructive discussions with funders. The National Archives have adopted a flexible approach to Archive Service Accreditation and supported services during this uncertain period. Arts Council England have postponed all Museum Accreditation reviews for another year.

Climate Change implications:

With most staff working from home there has been a reduction in travel to the workplace and energy use. However this may be offset by increased personal heating, lighting and broadband use. Strongrooms have continued to be maintained with essential checks on collections.

Health Impact Assessment screening:

Staff wellbeing may have been negatively impacted by isolation and lack of social interaction in the same way that users and volunteers have been affected. Service team meetings have been moved online to Microsoft Teams and all managers encouraged to deliver 1-1s and check in on staff.

Report author:

Authors' Names: **Joanna Terry, Head of Archives & Heritage**

Telephone No: (01785) 278370

Room No: Staffordshire Record Office

List of Background Papers

Papers

Contact/Directorate/ext number

Staffordshire Archives and Heritage Recovery Plan
Stoke on Trent City Archives Recovery Plan.

Local Member Interest	Nil
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STAFFORDSHIRE AND STOKE ON TRENT JOINT ARCHIVES COMMITTEE

25th February 2021

JOINT ARCHIVE SERVICE – PREDICTED OUTTURN 2020/21 & 2021/22 NET REVENUE BUDGET

Recommendation(s)

1. That the report updates the Joint Archive Committee on the current 2020/21 net revenue outturn budget position.
2. That the 2021/22 net revenue budget be approved by the Joint Archive Committee.

Joint report of the Director of Corporate Services and the Director of Families and Communities Services

Reasons for Recommendations

3. The Joint Archive Service net revenue outturn is currently estimated as a £0.163m overspend in the 2020/21 financial year.
4. The partnership continues to hold reserves totalling £0.370m. This includes:
 - a. The General Reserve currently holds a balance of £0.303m
 - b. The Archive Acquisition Reserve remains unchanged with a balance of £0.057m.
 - c. A specific reserve of £0.010m from the Art Fund grant (Minton)

Predicted Net Revenue Outturn 2020/21

5. The detail of the 2020/21 net revenue outturn for the Joint Archive Committee can be found as *Appendix 2* to this report.
6. To date, the Joint Archives net spend is currently £0.526m, 86% of the current net revenue budget of £0.614m. Latest forecast is for an overall overspend of £0.163m this year as follows:
 - a. Core services; £0.071m overspend, largely a result of the delayed delivery of savings through the planned reorganisation of the archives and heritage service

- b. Staffordshire County Council sites and public services; £0.092m overspend, largely a result of delayed delivery of savings through the planned reorganisation of the archives and heritage service
- c. Stoke-on-Trent sites and public services; an underspend of £0.056m and it is assumed this will be transferred to reserves at year end to provide, overall, for a breakeven budget

If the above overspend is realised at financial year end, the balance will be covered by Staffordshire County Council.

Reserves

- 7. The current balances on Reserves are set out in *Appendix 3*.
- 8. It is currently forecast that the remaining reserves at the end of 2020/21 available for use will be c £0.415m, around £0.045m more than the current balance. This assumes in 2020/21:
 - a. Net transfer into reserve of the Stoke-on-Trent underspend; £0.055m
 - b. full use of the Art Fund Grant – Minton; (£0.010m)
- 9. Following the Joint Committee's approval at the November 2020 meeting it is anticipated that (£0.251m) of the remaining reserve balance as at the end of March 2021 will be used during 2021/22 to contribute towards:
 - a. The capital investment of the Staffordshire Heritage Centre National Lottery Heritage Fund bid.

Net Revenue Budget 2021/22

- 10. The detail of the 2021/22 net revenue budget for the Joint Archive Committee can be found as *Appendix 4* to this report.
- 11. The impact of this is that Staffordshire County Council's Joint Agreement budget is £0.400m (66% of the total JAC budget) whilst the Stoke on Trent City Council's budget has been set at £0.208m (34% of the total JAC budget).
- 12. The total joint Archives Service's budget for 2021/22 is £0.608m, a reduction of £0.006m from 2020/21's budget, this is mainly as a result of Staffordshire County Council's budget re-alignment to reflect the new proposed organisational structure that will be effective from early 2021.
- 13. If Staffordshire County Council's budget re-alignments were to be re-cast into 2020/21 then this would give a revised budget for 2020/21 of £0.395m which would then show that the budget of £0.400m for 2021/22 had received an uplift of £0.0004m.

14. Staffordshire County Council's budget has had an inflationary increase of 1% for pension costs and all non-staffing income and expenditure budgets have received a 1% inflationary uplift.
15. Stoke on Trent has had an inflationary increase of 1% on Public Sites employee costs and no other inflationary uplifts for any other income or expenditure budgets.

Equalities implications:

No significant implications.

Legal implications:

The Joint Archive Agreement budget is subject to an Internal Audit, on an ad hoc basis, following the cessation of the annual Small Bodies Audit return.

Resource and Value for money implications:

The Joint Agreement budget is monitored regularly throughout the year.

Risk Implications:

No significant implications.

Climate Change Implications:

No significant implications.

Health Impact Assessment screening:

No significant implications.

Report author:

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List of Background Papers

Joint Archives Budget File 2020/21 & 2021/22.

Joint Archives Reserves File.

Joint Archives Service
Appendix 2
Predicted Outturn Position 2020-2021

	Core Services			Staffordshire County Council Sites and Public Services			Stoke-on-Trent City Council Sites and Public Services			Total for Service		
	Current Budget	Actual Expenditure @ Jan-2021	Predicted Outturn	Current Budget	Actual Expenditure @ Jan-2021	Predicted Outturn	Current Budget	Actual Expenditure @ Jan-2021	Predicted Outturn	Current Budget	Actual Expenditure @ Jan-2021	Predicted Outturn
	£	£	£	£	£	£	£	£	£	£	£	£
Expenditure												
Employees	261,670	245,000	335,981	194,290	210,925	277,350	141,600	68,044	95,100	597,560	523,969	708,431
Training	240	0	0	0	0	0	900	0	0	1,140	0	0
Transport	820	125	238	100	326	478	300	0	0	1,220	450	716
Supplies & Services	4,520	1,173	1,463	18,150	10,867	17,799	19,200	1,290	8,900	41,870	13,330	28,162
Transfer to/(From) Reserves	0	0	(300)	0	0	0	0	0	55,700	0	0	55,400
Total Expenditure	267,250	246,298	337,382	212,540	222,117	295,627	162,000	69,334	159,700	641,790	537,749	792,709
Income												
Grants & Reimbursements	0	350	350	0	0	0	200	0	0	200	350	350
Sales	0	0	0	9,290	4,562	4,245	400	0	0	9,690	4,562	4,245
Fees & Charges	0	0	0	9,300	4,740	8,323	1,900	92	200	11,200	4,832	8,523
Miscellaneous	3,270	2,100	2,100	3,600	339	339	0	25	0	6,870	2,464	2,439
Total Income	3,270	2,450	2,450	22,190	9,641	12,907	2,500	117	200	27,960	12,208	15,557
Net Expenditure	263,980	243,848	334,932	190,350	212,476	282,720	159,500	69,217	159,500	613,830	525,541	777,152
										Predicted Overspend		163,322

Joint Archives Reserves

	Staffordshire County Council £	Stoke on Trent City Council £	Total £
<u>General Reserve</u>			
Balance brought forward 1 April 2020	268,888	33,771	302,659
2020/2021 Transactions			
Air Conditioning - approved in 2019/2020 (On hold)		0	0
Forecast Overspend in 2020/21 - Core Services		-300	-300
Forecast Underspend in 2020/2021 - Sites & Public Services		55,700	55,700
Subtotal (balance as at 31 March 2021)	268,888	89,171	358,059
Future Transactions			
Staffordshire History Centre - match funding	-251,000		-251,000
Balance Available (as at 31 March 2022)	17,888	89,171	107,059
<u>Acquisition Reserve</u>			
Balance brought forward 1 April 2020	57,542	0	57,542
2020/2021 Transactions			
			0
Subtotal (balance as at 31 March 2021)	57,542	0	57,542
Future Transactions			
			0
Balance Available (as at 31 March 2022)	57,542	0	57,542
<u>Art Fund Grant - Minton</u>			
Balance brought forward 1 April 2020	0	10,301	10,301
2020/2021 Transactions			
Art Fund Grant - Minton Archive		-10,301	-10,301
Subtotal (balance as at 31 March 2021)	0	0	0
Future Transactions			
Balance Available (as at 31 March 2022)	0	0	0
<u>Grand Total</u>			
Balance at 31 March 2021	326,430	89,171	415,601
Forecast Balance at 31 March 2022	75,430	89,171	164,601
Notes:			

**Joint Archives Service
Budget 2021-22**

Appendix 4

	Core Services	Staffordshire County Council Sites and Public Services	Stoke-on-Trent City Council Sites and Public Services	Total for Service	
	£	£	£	£	
Expenditure					
Employees	269,810	196,350	144,100	610,260	
Training	4,630	0	900	5,530	
Transport	3,800	0	300	4,100	
Supplies & Services	22,380	16,150	19,200	57,730	
Total Expenditure	300,620	212,500	164,500	677,620	
Income					
Grants & Reimbursements	0	0	200	200	
Sales	0	9,390	400	9,790	
Fees & Charges	0	49,950	1,900	51,850	
Miscellaneous	4,420	3,640	0	8,060	
Total Income	4,420	62,980	2,500	69,900	
Net Expenditure	296,200	149,520	162,000	607,720	
					Funded by:
					Staffordshire
					399,520
					66%
					Stoke-on-Trent
					208,200
					34%

Members Interest
N/A

Staffordshire and Stoke on Trent Joint Archive Committee 25 February 2021

Staffordshire and Stoke on Trent Archive Service: Staffordshire History Centre Project Update

Recommendation(s)

1. That the committee notes the update on the Staffordshire History Centre project.

Report of Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke on Trent City Council)

Reasons for Recommendations

Summary

2. Work on the Staffordshire History Centre Project has continued to progress since the meeting of Joint Archives Committee on 12 November 2020. The key areas of progress have been the audience research, learning, Activity Plan, Interpretation Plan, Design Plan, Business and Marketing Plans.

3. The project passed the mid-stage review with the National Lottery Heritage Fund on 10 December 2020 and the final application will be submitted on 1 March 2021.

Activity Plan and learning

4. The Activity Plan has been rewritten informed by the evidence from the Audience Research and Learning Plan. This has meant that we have redefined our target audiences. Our existing core audiences are:

- Volunteers – who may be interested in helping to develop content and working with visitors.
- Older, relatively affluent people – who have a broad interest in history and culture.
- Family and local history enthusiasts – special interest visitors who will want in-depth content related to their interests.
- Researchers - who will want to delve deeper into subjects and the collection.
- Visitors to Stafford – who will want a free and engaging heritage experience supported by light touch interpretation.

5. We have also identified these target audiences who are currently under-represented in our audience profile:

- **Families with children** living within in 21 miles / 37-minute drive time – a key audience who will expect engaging local stories with content and activities for children.

- **School groups in Staffordshire** - who will need curriculum related content, space to gather, and facilitated learning.
- **University students and academics** – who need will space for individual study and access to research resources.
- **Adult learners in Staffordshire** - who will also want to delve deeper into the collection.
- **People from different cultures and backgrounds** – who may be interested in content that relates to their experience as immigrants.
- **People from areas of low engagement in Staffordshire** (Tamworth, Newcastle, Burton on Trent, Leek, Cannock, Uttoxeter and parts of south Staffordshire) - who may need some encouragement to come in and have fun experiences to try.
- **People from rural communities in Staffordshire** – who may also need encouragement to come to Stafford to the SHC
- **People with early on-set dementia**– who will need to feel safe and comfortable in a visit that can stimulate memory and reminiscence.
- **Voluntary youth groups in Staffordshire** – who may be interested in helping to develop content and working with our collections.

6. The Activity Plan sets out a four-year programme of activities to attract visitors to the History Centre and to engage with the Service beyond the Centre in Stafford. It includes a new website for the service with an integrated online catalogue, the Staffordshire Name Indexes site, and Staffordshire Past Track. An online shop will also be available.

7. Throughout the project our target is to engage with over 300,000 visitors, 4,500 students and 80 teachers. We will recruit 102 volunteers to deliver new roles supporting the History Centre public offer and working on our collections. We estimate they will contribute 4,803 days of time with an in-kind value of £721,050.

8. We will deliver:

- Ten exhibitions at the History Centre and five touring exhibitions
- Four targeted projects to diversify our collections and engage new audiences.
- Family activities, roadshows and behind the scenes tours to open up the collections to a wider range of visitors.
- Create a Staffordshire History Network to work in active partnership with our stakeholders, Friends groups and local history groups.
- Create seven school/higher education sessions and engage students and teachers in creating content to support our exhibitions.
- Deliver an extensive training programme for our staff, volunteers, and community groups
- Create a new website, blog and deliver a programme of digitisation of key collections based on feedback from our research.

9. Four new posts will be created to support the delivery of the project. They include:

- Community History Development Officer to support delivery of the Activity Plan and engage with local groups, partners and volunteers.

- Learning Officer to deliver the learning programme working core staff and the Community History Development Officer.
- Collections Interpretation Assistant to create the content for the onsite and touring exhibitions supported by the core staff.
- Project cataloguer to catalogue the William Salt Library collection enabling it to be more widely accessible and used in the activities and exhibitions.

Design, Interpretation, and environmental sustainability

10. The design team, Pringle Richard Sharratt, have produced an updated design report. This includes a new garden with planting to promote increased biodiversity. The masterplan is now included in the phase 1 works with funding identified from the existing budget and increased partner contributions. The storage has been increased from two to four floors and a new planning application has been submitted. A decision upon the planning should be received in May before the project is considered by the Heritage Fund in June. An Access Strategy has been commissioned to cover physical and intellectual access across the building, activities and interpretation.

11. Iagemakers have revised the Interpretation Plan to include interpretation of the garden and restoration of the William Salt Library building. Following feedback from the Heritage Fund at the mid-stage review the content of the plan has been rewritten by the staff team to reflect the changes in the Activity Plan.

12. A COVID impact assessment has been produced for the project particularly focusing on how the building, exhibition, and visitor spaces can be used if social distancing measures are in place.

Business and Marketing Plans

13. The Business Plan was rewritten to draw informed by the audience research, market analysis, Activity Plan and updated strategic context. It includes updated cashflow and projected income and expenditure for the Archive and Heritage Service and the William Salt Library Trust.

14. The plan demonstrates the need for the project and potential visitor numbers, audiences, and the drive time distance for anticipated visitors to travel from. The financial analysis demonstrates that both partners will achieve balanced budgets and predicts a surplus in years two and three once the History Centre opens.

15. The Marketing Plan which also includes a Communications Plan has been developed by the Audience Agency and core staff. It covers three phases of the project:

- Develop Phase - 2021-2022
- Launch Phase - 2022-2023
- Growth Phase - 2023-2025

16. The plan focuses on digital channels but also includes some print media and a new leaflet for the service to support promotion to a wide range of potential visitors. The budget is £40,000 over the four years of delivery. After the external funding has ceased the service will continue marketing using primarily digital channels and existing print budgets realigned to support this activity.

William Salt Library collection work

17. During the development phase work has been completed to repackage and list recent accessions to the Library's collections. This has been supported by further work from the Assistant Librarian to catalogue and relocate items to make removal from the building simpler.

Evaluation plan

18. The Monitoring and Evaluation Plan has been revised to take account of the changes to the Activity, Interpretation, Design and Business Plans. It has been extended to include evaluation of the capital works. The plan enables the project team to measure how the project will meet the following outcomes:

- Increased participation and engagement.
- Engagement with new and diversified audiences
- People have had a fun and enjoyable experience
- The project has increased learning for people
- The project has created a sense of community pride
- The project has improved health and wellbeing
- Staff and volunteers have learnt new skills and confidence
- Management of the collections and William Salt Library building has improved
- Partners feel they are contributing and valued
- The History Centre, William Salt Library and partners are more resilient and contributing to economic impact in Stafford.

19. A brief for an evaluation consultant has been completed to support the core team during the delivery phase. Evaluation will start at the beginning of delivery and continue throughout the four-year programme of activities and post-project completion.

Cost plan and funding

20. The cost plan has been updated, amended and tested to reflect recent quotes and adjusted rates of inflation and contingency. Additional funding has been secured from Staffordshire County Council, William Salt Library Trust and service revenue budgets. A summary of the costs and funding is given below:

Cost heading	Description	Total
Capital costs	Construction, interpretation, website, equipment and fit out	£5,010,900
Other costs – activities	Staff costs, activities, equipment, materials, training and travel	£516,200
Other costs	Recruitment, publicity and promotion, evaluation, contingency, inflation, increased maintenance and management costs, non-cash contributions, volunteer time	£1,621,500
Total		£7,148,600

Income Description	Value	Secured?
SCC Capital £1,894,000 Division Revenue £4,300	£1,898,300	Yes
Friends and Depositors £28,600	£28,600	Yes
Hildegard Simon Trust £100,000 Wellcome Trust £31,340 WSL Trust £20,000 Diocese £5,000	£156,300	Yes
Archive reserve £251,000	£251,000	Yes
Increased management and maintenance costs for 2 years	£79,400	Yes
WSL Trust Land	£50,000	Yes
Volunteer time	£721,000	No
NLHF Grant	£3,964,000	No
Total	£7,148,600	

Timescales

21. The round two application will be submitted on 1 March 2021. A decision by National Lottery Heritage Fund: England, Midlands and East committee will be made in June 2021.

22. If the application is successful after permission to start is granted the project would begin in October 2021. Construction will start in summer 2022 and the History Centre would open in October 2023. The project continues until November 2025.

Appendix 1

Equalities implications:

The National Archives, stakeholders, partners and staff have been involved in development of the project.

Legal implications:

The legal paperwork for the William Salt Library Trust and Staffordshire County Council has been reviewed and updated.

Resource and Value for money implications:

The delivery of the Staffordshire History Centre will enable the Archive and Heritage Service and William Salt Library Trust to achieve a sustainable model for future delivery.

Risk implications:

There is a risk that funding will not be secured for the project. This will impact upon the accreditation status of the Archive and Heritage Service. A review of options would be completed and approval for delivery of an alternative option would be sought.

Climate Change implications:

The project balances online access and physical access to services and collections to offer options for remote use and not necessarily travel to multiple locations. Any new buildings will be compliant with modern standards for energy efficiency and minimise impacts on climate change. The project includes elements to improve the outcomes for wildlife and the environment.

Health Impact Assessment screening:

The project will offer opportunities for volunteers to get involved and add value to the service with support and accredited training programmes from staff. Volunteering provides many social benefits for individuals which can impact positively on health.

Report author:

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Room No: Staffordshire Record Office

List of Background Papers

Papers	Contact/Directorate/ext number
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Members Interest
N/A

Staffordshire and Stoke on Trent Joint Archive Committee 25 February 2021

Staffordshire and Stoke on Trent Archive Service: Tamworth Castle Archive

Recommendation(s)

1. That the committee notes the update on Tamworth Castle Archive.

Report of Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke on Trent City Council)

Reasons for Recommendations

Summary

2. In November 2020 members of Tamworth Borough Council approached the Staffordshire County Council Cabinet Member for Communities and Culture to discuss the Tamworth Castle Archive.
3. It was agreed that officers from Tamworth Borough Council Museum Service and Staffordshire County Council's Archive and Heritage Service will work together to identify an appropriate solution for the future care and access to the collection.

Background

4. The archive at Tamworth Castle comprises of several locally and regionally significant collections relating to the history of the town. The key collections are local authority and predecessor bodies, quarter sessions, family and estate records, local schools, highways, charities, a large photographic collection and local studies material.
5. Advice and guidance was provided to the Borough Council Museum Service in 2000 by the Archive Service. This resulted in a considerable amount of work by the Museum Service to repackage the collection and improve storage conditions. Some inventories have also been completed for the collection.
6. Prior to COVID-19 access to the collection was restricted by the availability of the Collections Officer to accommodate appointments for visitors. Volunteer support has been lost due to COVID-19 which assisted the staff in research and responding to enquiries.
7. There is just one member of staff responsible for the collection who also has responsibilities for the collections on display at the Castle and stores, key holding responsibilities, curatorial responsibilities, COSHH (Control of Substances

Hazardous to Health), responding to written and in-person enquiries as well as providing access to the archives.

8. The discussion between members and officers from the two authorities has resulted in an agreement to work together to assess the collection and its future location. An application for external funding from The National Archives COVID-19 emergency fund to support this work has been submitted by the Archive and Heritage Service. The outcome will be known later in February and if successful would provide funding for additional staff resources to work on existing inventories to enable a thorough appraisal of the collection.

9. Future plans for the archive collection have not been confirmed however both authorities are committed to improving access and this could potentially mean the collection is deposited at Staffordshire Record Office. If the collection is relocated the Archive and Heritage Service would work with Tamworth Castle Museum to ensure the collection is accessible through, for example, exhibition loans, digitisation and a comprehensive catalogue on the online catalogue.

10. A further update will be brought to the Joint Archives Committee once a plan has been agreed for Tamworth Castle Archive.

Appendix 1

Equalities implications:

None applicable.

Legal implications:

If the collection is transferred, in consultation with Tamworth Borough Council, it will be under the Terms of Deposit approved by the Joint Archives Committee.

Resource and Value for money implications:

External funding has been applied for from The National Archives COVID-19 emergency fund to support this work.

Risk implications:

If external funding is not achieved work to assess the collection will take longer to identify a suitable solution for future access.

Climate Change implications:

None applicable

Health Impact Assessment screening:

None applicable

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