

Staffordshire and Stoke-on-Trent Joint Archives Committee

Tuesday 28 February 2023

10:30

Oak Room, County Buildings, Stafford

John Tradewell
Director of Corporate Services
20 February 2023

A G E N D A

1. **Apologies**
2. **Declarations of Interest in accordance with Standing Order 16**
3. **Minutes of the meeting held on 8 August 2022** (Pages 1 - 6)
4. **Staffordshire History Centre Project - Update** (Pages 7 - 12)

Joint report of the Director for Economy, Infrastructure and Skills (Staffordshire County Council) and Director of Strategy and Resources (Stoke-on-Trent City Council)
5. **Joint Archive Service - Predicted Outturn 2022/23 and 2023/24 Net Revenue Budget** (Pages 13 - 22)

Joint report of Deputy Chief Executive and Director of Corporate Services (Staffordshire County Council) and the Director of Strategy and Resources (Stoke-on-Trent City Council).
6. **Joint Archive Service - Review of Fees and Charges 2022/23** (Pages 23 - 32)

Joint report of the Director for Children and Families (Staffordshire County Council) and Director of Strategy and Resources (Stoke-on-Trent City Council)
7. **Joint Archives Service - Preservation and Conservation Policy** (Pages 33 - 54)

Joint report of the Director for Children and Families

(Staffordshire County Council) and Director of Strategy and Resources (Stoke-on-Trent City Council)

8. **Joint Archive Service - Digital Engagement Strategy** (Pages 55 - 70)

Joint report of the Director for Children and Families (Staffordshire County Council) and Director of Strategy and Resources (Stoke-on-Trent City Council)

9. **Joint Archive Service - Predicted Performance Outturn 2022/23** (Pages 71 - 76)

Joint report of the Director for Children and Families (Staffordshire County Council) and Director of Strategy and Resources (Stoke-on-Trent City Council)

10. **Date of next meeting**

Thursday 22 June 2023, 10.30 am, venue to be confirmed.

11. **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)

12. **Exempt minutes of the meeting held on 8 August 2022** (Pages 77 - 78)

(exemption paragraphs 2 and 3)

13. **Relocation of Stoke-on-Trent City Archives**

(exemption paragraphs 2 and 4)

Exempt Joint oral report of the Director for Economy, Infrastructure and Skills (Staffordshire County Council) and Director of Strategy and Resources (Stoke-on-Trent City Council)

Membership

Notes for Members of the Press and Public

Filming of Meetings

Staffordshire County Council is defined as a Data Controller under the Data Protection Act 2018. The County Council has agreed that Public meetings should be the subject of live web transmission 'webcasting'. Fixed cameras are located within meeting room for this purpose.

The webcast will be live on the County Council's website and recorded for subsequent play-back for 12 months. The recording will also be uploaded to YouTube. By entering the meeting room and using the seats around the meeting tables you are deemed to be consenting to being filmed and to the possible use of those images and sound recordings for the purpose of webcasting.

If you have privacy concerns about the webcast or do not wish to have your image captured then please contact the Member and Democratic Services officer named at the top right of the agenda.

Recording by Press and Public

Recording (including by the use of social media) by the Press and Public is permitted from the public seating area provided it does not, in the opinion of the chairman, disrupt the meeting.



**Minutes of the Staffordshire and Stoke-on-Trent Joint Archives
Committee meeting held on 8 August 2022**

Present: Mark Sutton, Lorraine Beardmore and Victoria Wilson

Apologies for absence: John Francis

PART ONE

1. Appointment of Chairman

Resolved – That Councillor L Beardmore be appointed Chairman until the Annual Meeting in June 2023.

2. Declarations of Interest in accordance with Standing Order 16

There were no declarations of interest on this occasion.

3. Minutes of the meeting held on 3 March 2022

Resolved – That the minutes of the meeting held on 3 March 2022 be confirmed and signed by the Chairman.

4. Staffordshire History Centre Project - Update

A progress report on the development of the Staffordshire History Centre was considered. Key points to note were that the construction contract was expected to be awarded in early autumn 2022, the William Salt Library Collection had been successfully moved to a temporary location and staff and volunteers at both that Library and the Staffordshire Records Office had relocated to a temporary base at Eastgate House. Various projects and events were taking place as the service continued to be accessible to the public.

Updates on the temporary arrangements and communications about the History Centre project were regularly published.

The first tranche of Heritage Funding (£63,025.83) had been approved with other sources of funding continually being investigated. Stafford Borough Council had recently agreed a £250,000 bid in their UK Shared Prosperity investment plan towards the public realm aspects of the History Centre (subject to Government approval).

The temporary closure of full facilities and services had necessitated the development of a Public Access Model whereby access would be permitted on one day per week where necessary to fulfil statutory or time sensitive requirements. Volunteers and staff would have limited access to strong

rooms throughout the period of the Project to enable them to provide copies of documentation where the client does not need direct access to any original version.

Proposed Branding for the project had been reviewed to take account of comments at earlier Joint Committee meetings. Various revised options were presented. Discussing those options, Members focussed on their flexibility to suit individual collections/exhibitions and compatibility with each Councils' own branding.

Resolved- that:

- a) the progress report be noted
- b) the Public Access Model be approved
- c) approval be given to the Branding based on an 'S' as illustrated at Appendix 3 to the report.

5. Staffordshire and Stoke on Trent Archive Service and Staffordshire Archives and Heritage Service: Volunteer Policy Review

Lead Officers presented a draft updated Volunteer Policy and accompanying Volunteer Agreement explaining that they had been developed following consultation with Volunteers on their personal needs and reasons for volunteering and their expectations of both the role and of the Councils.

The Volunteer Policy was compatible with other policies in use by the Councils, acknowledged that volunteering was an individual, personal experience and introduced a more public facing approach. The inclusion of a Code of Conduct was a key change, reflecting best practice and addressing safeguarding considerations.

The Volunteer Agreement aimed to offer a quality experience and defined the expectations of each party. The review exercise was now informing a revision of the County Council's Policies.

The importance of not deterring volunteers by having too bureaucratic processes was stressed and acknowledged.

Resolved – That the Updated Volunteer Policy and use of the enhanced volunteer Agreement be approved; the inclusion of best practice guidelines to encourage knowledge sharing and continuity across the service be noted.

6. Staffordshire and Stoke on Trent Archive Service and Staffordshire Archives and Heritage Service: Joint Collections Statement

Lead Officers reported that whilst it had originally been intended to develop one Joint Collecting Policy for all 3 disciplines, further review had shown this

approach would not meet their needs therefore an overarching Joint Collection Statement had been drafted.

Consideration was given to the draft Statement which aimed to be more proactive, better defining what the collections should contain, moving away from responding to individual offers.

Resolved – That the Joint Collection Statement be approved; it's content to be reviewed on a 3 yearly basis.

7. Staffordshire and Stoke on Trent Archive Service and Staffordshire Archives and Heritage Service: Annual Report

Lead Officers presented the Annual Report on the work of the Joint Archive Service and Archive and Heritage Service for the period April 2021 – March 2022, together with the updated Risk Register.

The securing of funding and development of the History Centre during the reporting period was detailed, together with statistics showing that whilst visitor numbers had not fully recovered to pre COVID 19 pandemic levels, progress was pleasing.

Details were given of key exhibitions, accessions and collections with particular reference made to the 'Case for the Ordinary' exhibition.

Performance Indicators showed a 36% increase in use of the service and a 99% customer satisfaction rate. Instances of on line access to the service had exceeded 2.1 million. Members discussed the quality of the service and the need for a communications campaign to increase public awareness of its existence. The planned transfer of the Stoke-on-Trent Archives Service to the City Museum and Art Gallery was expected to contribute to increasing that awareness.

The Risk Register was drawn up in conjunction with the County Council's Internal Audit Service and aimed to identify risks to collections, staff, volunteers, the public and the future sustainability of the service.

Resolved – That the Annual Report 2021/22 be noted and publicised by both Councils, and the Joint Committee's appreciation of the work and commitment of staff and volunteers to the delivery of the Service and preparation for the History Centre development be recorded.

8. Joint Archive Service - 2021/22 Final Outturn and Predicted Outturn 2022/23

The Final Outturn for 2021/22 had shown the Joint Committee's revenue net spend was £0.761m compared to the approved budget of £0.761m which produced an overall breakeven position.

For 2022/23, the Joint Archives net spend is currently £0.074m, nearly 9% of the current net revenue budget of £0.812m. The latest forecast is for an overall breakeven position this year.

The Final Outturn for 2021/22 had shown the Joint Committees General Reserves to be £413,387 comprising:

Staffordshire County Council	£286,600
Stoke-on-Trent City Council	£124,339

Future transactions, particularly for the History Centre were expected to reduce that Reserve to £179,662 by March 2023.

The 2021/22 Acquisitions Reserve of £57,542 was expected to remain static for 2022/23. This Reserve was specifically held to provide funds should a particularly important large collection become available for purchase.

Including Art Fund Grant for Minton (£10,301) the overall Joint reserve budget 2021/22 had an outturn of £481,230, forecast to be £247,505 by 31 March 2023.

Resolved – That the Joint Archive Service Financial outturn for 2021/22 and Predicted Outturn for 2022/23 be noted.

9. Date of next meeting

Thursday 10 November 2022.
To be rearranged.

10. 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 as indicated.

The Joint Committee proceeded to consider the following items:

11. Exempt minutes of the meeting held on 3 March 2022 (exemption paragraphs 2 and 3)

Resolved – That the exempt minutes of the meeting held on 3 March 2022 be confirmed and signed by the Chairman.

12. Relocation of Stoke-on-Trent City Archives (exemption paragraphs 2 and 4)

The committee received a verbal report from the Lead officer updating them on progress on the relocation of Stoke-on-Trent City Archives Service.

Resolved – that the update be noted.

Chairman

Local Members Interest
N/A

Staffordshire and Stoke-on-Trent Joint Archive Committee – Tuesday 28 February 2023

Staffordshire History Centre Update

Recommendation(s)

That the Committee note:

- a. The progress update for the project.
- b. The revised costs and income.
- c. The feedback from the Prosperous Overview and Scrutiny Committee

Report of Director for Economy, Infrastructure and Skills (Staffordshire County Council) and Director of Strategy and Resources (Stoke on-Trent-City Council)

Reasons for Recommendations:

1. The Joint Archives Committee was updated on progress of the project at the meeting on 8th August 2022. This report brings an update on progress of the activities programme, procurement and the timeline for the project. It also includes feedback from the Prosperous Overview and Scrutiny Committee which considered a report on 3 February 2023.

Progress update on activities

2. To test alternative ways of opening up access, a new collection store tour was trialled at the County Museum in February with local groups. The positive feedback helped to create the final tour which has been delivered successfully throughout the year. A tour was also developed to offer a unique opportunity to see the William Salt Library without the collection in situ and historic features revealed. A very popular guided visit to the building was developed, with tours fully booked in minutes. Feedback included *'it was fascinating to see the building in a different way'; 'surprised that the building was so old'; 'the guide was a mine of information'*. Both tours attracted 607 participants in 2022.

3. In July we launched a new Staffordshire History Network with an in-person event at Lichfield. The network is aimed at local museums, societies and groups who either hold a collection or research local history. The initial event was oversubscribed and received positive feedback about the opportunities for networking and sharing ideas. We also launched a weekly network newsletter and have delivered an autumn event. Up to the end of December we have 412 subscribers to the network newsletter with 37 organisations represented.
4. Four project staff were recruited in October 2022 to support the Service team in delivering strands of the activity programme. The roles are supported by the Heritage Fund grant for the duration of the project. They include:
 - a. **Learning Officer** to co-produce, test and deliver educational sessions with schools and colleges and support informal learning.
 - b. **Community History Development Officer** to work with the History Network, deliver targeted projects with diverse communities and support the outreach activities.
 - c. **Collections Interpretation Assistant** to research the collections to identify objects for the onsite and touring exhibition programme.
 - d. **Project Cataloguer** to catalogue part of the William Salt Library collection to increase public access.
5. From April to December 2022 the project team have delivered 36 activities and engaged 1000 participants. Four student placements have been completed. In addition, 66 volunteers are working on the project to index, catalogue, digitise, research and preserve our collections. Up to December they have donated 2,826.75 hours which equates to £56,535 in matched funding for the project during 2022.
6. During the first year of the project 200 enclosure maps have been digitised thanks to a grant awarded to our Friends group from Midland Ancestors' Jack Kemp Fund. The maps are a key source for local history research and confirming the existence of rights of way. They are being added to the [Staffordshire Past Track](#) website. Other planned digital work is the development of a new website which will be procured in 2023. A digital engagement plan has been created to align with the new website.

Progress update on capital work

7. The construction contract was first advertised in December 2021 using a two-stage process. The first stage closed in April 2022 with five suppliers submitting compliant bids. Four were shortlisted and taken through to

the second stage. At the second stage one supplier submitted a compliant bid which was significantly over the advertised budget. This reflected the challenging market, suppliers being very busy and prioritising existing projects, and the impact of inflation on prices.

8. The bid was evaluated, and the cost consultants compared the prices against their estimates. The panel concluded that the quality of the bid, proposed team and method statements met the specification of the bid. The National Lottery Heritage Fund also confirmed that the procurement process had complied with their guidelines. The tender price was held from August to December 2022 to enable a review of project costs and to seek additional funds. The contract has now been awarded to Pave Aways Limited.
9. The Staffordshire Record Office and William Salt Library sites were handed over to Pave Aways Limited on 1 February 2023. Work has started on the site to clear the buildings and begin demolition in preparation for construction.
10. The interpretation contract covers the design and fit out of the exhibition space in the History Centre, features at the entrance and within the garden, signage, and within the ground floor of the William Salt Library. The contract was advertised from 1 -31 July 2022 with four suppliers submitting bids. One bid was not compliant, and another supplier withdrew. The contract was awarded to Imagemakers in August 2022. The company were asked to review costs to reflect the impact of inflation to inform the strategy for mitigating costs.
11. Imagemakers started work with the project team in November revising the designs to RIBA stage 3 and are now working on the RIBA 4 stage which will be shared with the Heritage Fund mentors. The staff team have been contributing suggestions for items from the collections to form part of the exhibition with alternatives to enable rotation of items. The star object will be a carriage from the museum collection to make a statement at the entrance.

Mitigation of costs and fundraising

12. The Staffordshire History Centre was granted permission to start by the Heritage Fund in November 2021 at a time when the United Kingdom was emerging from the COVID-19 pandemic. The Project Board and Team were aware that managing costs in this climate would be challenging. In addition, the impact of rising energy costs in 2022 and inflation contributed to a complex environment.
13. To mitigate against rising costs the team took pre-emptive action by:

- a. Utilising maintenance budgets for the replacement of the boilers in Staffordshire Record Office as they were due for refresh. Using Property Service budgets to support some of the design elements.
 - b. Using Archive and Heritage Service and William Salt Library budgets for some elements of the project.
 - c. Identifying storage for the William Salt Library collection from within Staffordshire County Council's own properties instead of paying for external storage.
 - d. Using Library Service vans and drivers to reduce the amount spent on removal companies.
 - e. Identifying potential funding streams to apply for grants before the construction costs were known.
 - f. Reviewing and monitoring costs at every project board.
 - g. Continually discussing costs with the National Lottery Heritage Fund and Staffordshire County Council to ensure they were aware of pressures.
14. The project team identified several external funding opportunities before the full construction costs were known. Staffordshire County Council also increased its capital contribution to the project. The successful funding bids include:
 - a. UK Shared Prosperity Fund with £250,000 allocated within Stafford Borough Councils government grant. This funding will contribute to the public realm work including a green walkway through the site connecting North Walls to Eastgate Street. It will support biodiversity and link two parts of the town centre.
 - b. Wolfson Foundation grant of £100,000 towards the Interpretation Plan for the History Centre.
 - c. Staffordshire County Council's climate change team allocated £28,048 as a contribution towards the direct project costs associated with the green roof and air source heat pumps in the new strongrooms.
 - d. Staffordshire County Council's cabinet approved an additional £250,000 towards the project on 14 December 2022.
 - e. The Joint Archives Committee is asked to approve an additional £40,000 from the reserve as detailed in the finance update.
 - f. The project costs were reviewed and value engineered to reduce them by £391,000.
 - g. The National Lottery Heritage Fund approved a grant uplift of up to £894,699 on 24 November 2022.
15. The total cost of the project is now £8,780,239 with a grant of £4,858,699 from the National Lottery Heritage Fund. The total match

funding is £3,921,540 which includes Staffordshire County Council funding, grants from other organisations, donations from the friends of the services and in-kind contributions from volunteers.

16. The programme for completion of construction of the Staffordshire History Centre has been delayed by approximately 10 months. The delay is due to a more complex procurement process, reviewing project costs, and submitting additional grant requests.
17. The activity programme has also been impacted by this delay as whilst some activities are planned to be delivered at other venues across the county a significant number are planned at the Centre once it has opened. The programme has been adjusted to take account of this.
18. The interpretation development has been aligned to fit in with the construction timetable. The content development is to be completed by summer 2023 with sign off by the end of the year.
19. It is estimated that construction will complete in summer 2024 when the site will be handed back for fit out. The planned opening will be autumn 2024.

Feedback from Prosperous Overview and Scrutiny Committee

20. A report was considered by the Prosperous Overview and Scrutiny Committee on 3 February 2023. The report was very well received and it was noted that the Staffordshire History Centre project was a good news story for Stafford and the whole county. Members of the committee asked about:
 - a. How the project had addressed green issues. Information was provided about the passive construction of the strongrooms and the green roof.
 - b. The security of the exhibition space and the items that will be on display. Security arrangements and content of exhibitions was confirmed.
 - c. Wider development around the site. It was clarified that funding was only available for the History Centre site but that the car park would be resurfaced and the walkway through the site would enhance the local area.
21. The committee agreed the recommendations and requested a further update and visit to the site in the summer of 2023.

Legal Implications

The legal agreements between Staffordshire County Council and the William Salt Library were approved for completion by the Council's cabinet on 14 December 2022. The Trust agreed completion at its meeting on 23 January 2023. The solicitors for both parties completed the agreements on 1 February 2023.

Resource and Value for Money Implications

Procurement of goods and services for the project complies with Staffordshire County Council's procurement framework. Costs have been closely monitored and reviewed with external successful funding applications ensuring the project could continue.

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. Opportunities to attract additional funding to increase energy efficiency will be pursued. The project includes elements to improve the outcomes for wildlife and the environment. These elements have received financial support from the climate change funds held by Staffordshire County Council.

List of Background Documents/Appendices:

Prosperous Overview and Scrutiny Committee 3 February 2023 report:
[Staffordshire History Centre update](#)

Contact Details

Assistant Director:	Catherine Mann MBE, Interim Assistant Director – Culture, Rural and Safer Communities
Report Author:	Joanna Terry
Job Title:	Head of Archives and Heritage
Telephone No.:	01785 278370
E-Mail Address:	joanna.terry@staffordshire.gov.uk

Local Members Interest
N/A

Staffordshire and Stoke on Trent Joint Archives Committee – Tuesday 28 February 2023

Joint Archive Service – Predicted Outturn 2022/23 & 2023/24 Net Revenue Budget

Recommendations

We recommend that the Committee:

- a. Notes the current 2022/23 net revenue outturn budget position.
- b. Approves a further £0.040m from Staffordshire County Councils general reserve towards the Stafford History Centre Project, taking the total funding approved to £0.291m.
- b. Note a transfer of £0.046m for climate Change funding received to Staffordshire County Councils general reserve towards the Stafford History Centre Project, to be allocated to the project in 2023/24.
- c. Approves the indicative 2023/24 net revenue budget.

Report of Director of Corporate Services (Staffordshire County Council) and Director of Strategy and Resources (Stoke on Trent City Council)

Reasons for Recommendations:

1. The Joint Archive Service net revenue outturn is currently estimated to breakeven in the 2022/23 financial year.
2. The partnership continues to hold significant reserves totalling £0.496m. This includes:
 - a. The General Reserve holds a balance of £0.428m
 - b. The Archive Acquisition Reserve holds a balance of £0.058m.
 - c. A specific reserve of £0.010m from the Art Fund grant for the Minton collection.

Predicted Net Revenue Outturn 2022/23

3. The detail of the 2022/23 net revenue outturn for the Joint Archive Committee can be found as *Appendix 1* to this report.

4. To date, the Joint Archives net spend is currently £0.592m, 72% of the current net revenue budget of £0.821m. Latest forecast is for an overall breakeven position for this year as follows:

Core Services

5. £0.007m underspend, of which £0.006m is as a result of savings against employee, training, transport and general expenditure budgets against Staffordshire County Council with further savings of £0.001m against Stoke-on-Trent employee costs.
6. It is assumed that the overall underspend of £0.007m will be transferred to the respective reserves, with the split £0.006m underspend for Staffordshire County Council and the £0.001m for Stoke-on-Trent to provide, overall, for a breakeven position.

Site and Public Services

7. Staffordshire County Council sites and public services; overspend of £0.002m as a result of an overspend against employees of £0.005m and an under-achievement of income of £0.004m, which is partially offset by savings against training, transport and general expenditure budgets of £0.007m.
8. Stoke-on-Trent sites and public services; underspend of £0.021m as a result of savings against employees, training, transport and general expenditure budgets and a slight over-achievement of income.
9. It is assumed that the overspend for Staffordshire County Council will be funded from their reserve and the underspend for Stoke-on-Trent will be transferred to their reserve at year end to provide, overall, for a breakeven budget.

Reserves

10. The Joint Archive Service currently holds three reserves totalling £0.496m and set out in *Appendix 2*. This is made up of:
 - a. The General Reserve which currently has a balance of £0.428m. This includes a transfer to Staffordshire County Council general reserve of £0.046m in January for Climate Change funding towards the History Centre Project to be allocated in 2023/24.
 - b. The Archive Acquisition Reserve, which enables the Joint Archive Service to purchase local collections for the benefit of archives users

in both the City and the County, and currently holds a balance of £0.058m; and

c. The Art Fund Grant (Minton) of £0.010m

11. It is currently forecast that the remaining reserves at the end of 2022/23 available for use will be c £0.266m, around £0.230m less than the current balance. This assumes in 2022/23:

a. Transfer to Staffordshire County Council general reserve underspend; £0.004m.

b. Transfer from Staffordshire County Council general reserve £0.256m as match funding for the History Centre Project.

c. Transfer into reserve of the Stoke-on-Trent general reserve underspend; £0.022m.

Net Revenue Budget 2023/24

12. The detail of the 2023/24 net revenue budget for the Joint Archive Committee can be found as *Appendix 3* to this report.

13. The impact of this is that Staffordshire County Council's Joint Agreement budget is £0.629m (73% of the total JAC budget) whilst the Stoke on Trent City Council's budget has been set at £0.233m (27% of the total JAC budget).

14. The total joint Archives Service's budget for 2023/24 is £0.862m, an increase of £0.041m from 2022/23 budget.

15. Staffordshire County Council's budget has had an inflationary increase to reflect additional costs associated with national insurance and pension contributions. It also includes the provision for pay awards for 23/24 of 4%. All non-employee income and expenditure budgets have received a 4% inflationary uplift too.

16. Stoke-on-Trent's budget has had an inflationary increase to reflect additional costs associated with national insurance and pension contributions. It also includes the provision of 4% for the 23/24 pay award. The employee budget also includes a vacancy management factor of 3.5%, which means that the overall employee budget only equates to 96.5% of the real term cost. Therefore, the service is meant to achieve the budget shortfall by holding vacancies throughout the year. All non-employee income and expenditure budgets have not received any inflationary increase and remain as the 22/23 budget.

Legal Implications

17. The Joint Archive Agreement budget will be subject to an annual Audit and return.

18. A review of the current Joint Agreement.

Resource and Value for Money Implications

19. The Joint Agreement budget is monitored regularly throughout the year.

Climate Change Implications

20. No significant implications.

List of Background Documents/Appendices:

Joint and Other Archive Services 2022/2023 & 2023/2024 Budget File.

Joint Archives Reserves File.

Appendix 1 - Predicted Outturn Position 2022/23

Appendix 2 - Archives Reserves

Appendix 3 - Budget 2023/24

Contact Details

Assistant Director: Catherine Mann MBE, Interim Assistant Director – Culture, Rural and Safer Communities

Report Author: Nikki Mihajlovic

Job Title: Senior Finance Business Partner

Telephone No.: 01785 854879

E-Mail Address: Nikola.Mihajlovic@staffordshire.gov.uk

Appendix 1

Page 17

Joint Archives Reserves

	Staffordshire County Council £	Stoke on Trent City Council £	Total £
<u>General Reserve</u>			
Balance brought forward 1 April 2022	286,600	96,295	382,895
2022/2023 Transactions			
Climate Change Contribution to SHC	45,572		45,572
Subtotal (balance as at 31 March 2023)	332,172	96,295	428,467
Future Transactions			
Forecast Overspend to Reserve	0		0
Forecast Underspend to Reserve	4,223	22,112	26,335
Staffordshire History Centre - match funding	-256,476		-256,476
Balance Available (as at 31 March 2023)	79,919	118,407	198,326
<u>Acquisition Reserve</u>			
Balance brought forward 1 April 2022	57,542	0	57,542
2022/2023 Transactions			
			0
Subtotal (balance as at 31 March 2023)	57,542	0	57,542
Future Transactions			
			0
Balance Available (as at 31 March 2023)	57,542	0	57,542
<u>Art Fund Grant - Minton</u>			
Balance brought forward 1 April 2022	0	10,301	10,301
2022/2023 Transactions			
Art Fund Grant - Minton Archive			0
Subtotal (balance as at 31 March 2022)	0	10,301	10,301
Future Transactions			
Balance Available (as at 31 March 2023)	0	10,301	10,301
Grand Total			
Balance at 31 March 2022	389,714	106,596	496,310
Forecast Balance at 31 March 2023	137,461	128,708	266,169

Budget 2023-24

Appendix 3

	Core Services	Staffordshire County Council Sites and Public Services	Stoke-on-Trent City Council Sites and Public Services	Total for Service	
	£	£	£	£	
Expenditure					
Employees	351,190	328,800	162,700	842,690	
Training	1,650	3,350	900	5,900	
Transport	1,330	2,700	300	4,330	
Supplies & Services	6,739	25,031	19,200	50,970	
Total Expenditure	360,909	359,882	183,100	903,890	
Income					
Grants & Reimbursements	0	0	200	200	
Sales	0	9,760	400	10,160	
Fees & Charges	0	23,010	1,900	24,910	
Miscellaneous	2,530	3,780	0	6,310	
Total Income	2,530	36,550	2,500	41,580	
Net Expenditure	358,379	323,332	180,600	862,310	
			Funded by:	Staffordshire	629,510 73%
				Stoke-on-Trent	232,800 27%
					862,310

Local Members Interest
N/A

**Staffordshire and Stoke on Trent Joint Archive
Committee
– Tuesday 28 February 2023**

**Staffordshire and Stoke-on-Trent Archive Service and
Staffordshire Archives and Heritage Service: Review of
Fees and Charges**

Recommendation(s)

That the Committee:

- a. Approves the fees and charges for introduction by the Joint Archive Service and the Heritage Service from 1 April 2023.

**Report of Director for Economy, Infrastructure and Skills
Staffordshire County Council) and Director of Strategy and
Resources (Stoke on Trent City Council)**

Reasons for Recommendations:

1. The fees and charges have been reviewed on an annual basis since 1997 in accordance with the terms of the Joint Archives Agreement between Staffordshire County Council and Stoke-on-Trent City Council. This has enabled the Service to adapt its offer according to demand and the cost of provision. The proposed fees and charges are recommended for approval as they represent a fair and reasonable increase.

Background

2. The Archive Service generates income from the following sources: 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 generated by a partnership with a commercial provider to make key archive collections available online
3. During 2021/22 the Joint Archives Committee reviewed the charges for the research service and the services covered by this fee. This year the service has completed research into charges from neighbouring county

services to compare prices. A re-calculation of the actual cost of delivering services has been completed.

4. Photography and research service costs are covered by the charges levied. Copying costs are covered but do not include staff time. It was identified that talks and visits, and reproduction charges were significantly less than the actual cost. Therefore, the charges for these services have been increased to cover more of the staff time involved in their delivery. These are items 8 and 9 in the table at appendix 1.
5. The service also has a variety of charges for copies of items identified on the [Staffordshire Name Indexes](#) website shown in line 10 in table of charges. The fees have been tailored to different indexes and are included in the main charges. They will be reviewed during 2023 to streamline the charges and ensure they are in line with the main service charges.
6. Income for the service is predicted to be £3,897 at the end of quarter three in the 2022/23 financial year. It should be noted that both services are operating restricted access for visitors. Income from copying services remains high. Charges for these services are held this year whilst access is limited.

Legal Implications

The work of the Archive Service is governed by the Joint Agreement and other legislation to enable both authorities to meet their legal obligations.

Resource and Value for Money Implications

The revenue budget for the service is forecast to break even for 2022/23.

Climate Change Implications

The work of the service balances online access and physical access to services and collections to offer options for remote use and not necessarily travel to multiple locations.

List of Background Documents/Appendices:

Appendix 1: Scale of fees and charges 2023-2024
Charging methodology 2022
Comparison of charges 2022

Contact Details

Assistant Director: Catherine Mann MBE, Interim Assistant Director – Culture, Rural and Safer Communities

Report Author: Joanna Terry
Job Title: Head of Archives and Heritage
Telephone No.: 01785 278370
E-Mail Address: joanna.terry@staffordshire.gov.uk

STAFFORDSHIRE AND STOKE- ON- TRENT ARCHIVE SERVICE AND HERITAGE SERVICE**REVIEW OF FEES AND CHARGES, 2023/2024**

The current fees and charges and proposed changes are set out below. The proposed new charges would apply from 1 April 2023

FEE/CHARGE	CURRENT	PROPOSED	COMMENTS
RESEARCH FEES			
1. Research Fee Scope: looking for information in the sources (archival, printed or published online) available to the Staffordshire and Stoke on Trent Archive Service. Providing information on our holdings from indexes or catalogues is not chargeable Basis: Research orders will be charged in half hour blocks, with a minimum of half an hour and a maximum of four hours.	£36 (£28.80 +£7.20 VAT) per hour to include the cost of up to 4 copies and UK/EU postage Minimum charge £18 (£14.40 + £3.60 VAT) to include the cost of 2 copies and UK postage		These fees were increased in April 2022 and are held for 2023/4.
People with disabilities which prevent them from accessing the sources in the reading rooms of the Joint Archive Service will be charged at two-thirds of the standard rate.	£24 (£19.20 + £4.80 VAT) per hour to include the cost of up to 4 copies and UK postage for people with disabilities.		
1.1 Quick Research Fee Scope: looking for a single entry, article or item of information in a source on the basis of information provided by the enquirer which should lead directly to the entry or item desired and the provision of a single photocopy or transcription if found. This fee applies for the transcription of documents identified in the Staffordshire Name index. If a copy is requested and the source cannot be photocopied or transcribed within 15 minutes, the request will attract either the Staff Facilitation Fee or the Staff Photography Fee, not the QRF. Basis: One quarter of the Research Fee People with disabilities which prevent them from accessing the sources in the reading rooms of the Joint Archive Service will be charged at two-thirds of	£9 (£7.20 + £1.80 VAT) First class postage charged additionally. £6 for people with disabilities		No change proposed

Page 20

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
the standard rate. 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.	£45 (£36.00 £9.00 VAT)			No change proposed
2. Staff Facilitation Fee Scope: Staff time used to make a customer request for service possible, including but not restricted to <ul style="list-style-type: none">supervising documents outside the research room during professional photography, transporting documents to an external office for microfilming, conservation or other purposecertifying the content of archives held within the service for use in religious legal or other proceedingspreparing or conserving documents in order that a customer order can be carried outtranscribing or translating documents in private hands Basis: The fee will always be equal to the Research Fee.	£36 (£28.80 +£7.20 VAT) Minimum charge £18 (£14.40 + £3.60 VAT)	No change		This fee was increased in line with the research fee in 2022. No change proposed
COPYING CHARGES				
3. Photocopies and microform printouts identified and ordered in reading rooms	£1.50 (£1.24+0.26p VAT)	EU orders	Non-EU orders:	No change proposed.
4. Photocopies and microform printouts ordered	EU orders:	EU	Non-EU	No change proposed.

FEE/CHARGE		CURRENT		PROPOSED		COMMENTS
remotely		£5.00 (£4.17 +83p VAT) Successive copies on same order 1.50 (£1.24+0.26p VAT)		orders:	orders:	No change proposed
5. Computer print outs onsite		20p (Staffordshire) 10p (Stoke)		No change		This charge is held in line with Library Service fees in the County and the City and will vary in line with any changes made by the respective Library Services.
6. In-house Photography Charges		£36 per hour fee for photography including prints (£28.80 +£5.33 VAT) Minimum charge £18.00 (£14.40 + £3.60 VAT) The Staff Facilitation Fee may apply if conservation or preparation work is required in advance of the photographer carrying out the work.		No change		The provision of the images to the customer by digital download, by DVD or by print- out on ordinary photocopier paper, in person or by post will be free. Photographic prints will not be provided by the Archive Service. This fee was increased in 2022 and is held for2023/4
7. Permit Fees for Use of Digital Camera		£8 daily fee £50-00 annual fee				This fee will be held during the period of restricted access within the service.

FEE/CHARGE	CURRENT	PROPOSED	COMMENTS
8. Publication fees for the reproduction of documents in: exhibitions, hard copy or online publications or media broadcasting.	<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: £15 for first item, plus £5 for each additional item</p> <p>Commercial publication: hard copy/exhibition/ website: £50 for first item, plus £30 for each additional item E-book rights will attract an additional £50 per order</p> <p>TV broadcast and onsite filming and world wide web publication: £250 for world-wide rights for first item; £100 for each additional item.</p> <p>Filming on site only £200 per half day.</p>	<p>£20 for the first item plus £7.50 for each additional item.</p> <p>£60 for first item, plus £35 £60 for E-book rights.</p> <p>£260 for first item, £110 for each additional item</p> <p>£260</p>	<p>The structure of these charges aims to support the local and academic research community, ensuring that commercial providers bear costs proportionate both to the time involved in preparing rights agreements for them and to the larger audiences they aim to reach. They were last reviewed in 2020/21 and an increase is proposed for 2023/4</p>

Page 31

FEE/CHARGE	CURRENT	PROPOSED	COMMENTS
OUTREACH SERVICES			
<div> <div>9. Talks to external organisations and groups</div> <div> <div>Group visits to Staffordshire Record Office and Stoke on Trent City Archives</div> </div> </div>	<div> <div>Talks offsite</div> <div>£50-00 County/City</div> <div>£60-00 out of county</div> </div> <div> <div>Visits to Staffordshire Record Office or Stoke-on-Trent City Archives</div> <div>£50</div> <div>Visits which include a tour of the strongrooms and/or conservation will attract the Staff Facilitation Fee in addition. Visits on Saturday will attract the Staff Facilitation Fee</div> </div>	<div> <div>£60 County/City</div> <div>£60 plus travel time out of county</div> <div>£60</div> </div>	<div>Fees may be waived for groups for older people or people with disabilities at the discretion of the Service.</div>
<div>10. Staffordshire Name Indexes</div>	<div>Digital copies or transcriptions of original documents can be ordered from name indexes as per below.</div> <div>£5 per digital image: Apprentices, Parish Clerks, Quarter Sessions Coroners, Quarter Sessions Jurors, Stafford Gaol Photo Albums, Stoke-on-Trent Blind Welfare, The Mount School.</div> <div>£8 per transcript, record or will (including postage and</div>	<div>No change</div>	<div>There is a range of different fees for name index orders due to the varied nature of the source documents and the availability of existing digital copies.</div>

FEE/CHARGE	CURRENT	PROPOSED	COMMENTS
	<p>packing): Calendar of Prisoners, Diocese of Lichfield Wills, Police Force Register, Quarter Sessions Indictments.</p> <p>£4 for each transcript, and £1 for each additional transcript: Police Disciplinary</p> <p>£4 for up to 10 transcripts (UK); £4.50 (overseas) including postage & packing: Manor of Newcastle-under-Lyme.</p> <p>£5 for an index entry, £1 for each additional entry: Minton Archive</p> <p>£5 for an index entry, £1.50 for each additional entry: Michelin.</p> <p>Estimates for copies (using Copying Charges as per above) are available on request due to the complexity and variety of the sources: Asylums, Illegitimacy, Sentinel Newspaper Great War, Sutherland.</p>		

Local Members Interest
N/A

Staffordshire and Stoke-on-Trent Joint Archive Committee – Tuesday 28 February 2023

Preservation and Conservation Policy and Strategy

Recommendation(s)

1. That the Committee approves the Preservation and Conservation Policy and Strategy for Staffordshire & Stoke-on-Trent Archive Service and William Salt Library.

Report of Director for Economy Infrastructure and Skills (Staffordshire County Council) and Director of Strategy and Resources (Stoke-on-Trent City Council)

Reasons for Recommendations:

2. The Archive Service is an Accredited Service. As such it works to a set of policies approved by its governing body, which are regularly reviewed and revised.
3. The Preservation and Conservation Policy and Strategy is due for review and has been revised to take into account changes in the responsibilities of Staffordshire Archive & Heritage Service. In particular, the policy refers to the William Salt Library collection as the Service manages the library collection on behalf of its trustees.
4. Working in tandem with Staffordshire Museum Service's Care and Conservation Policy, the Archive Service's Preservation and Conservation Policy will ensure a co-ordinated approach to collections care across the three disciplines

Background

5. Staffordshire and Stoke-on-Trent Archive Service is managed and funded under the terms of a joint agreement between Staffordshire County Council and Stoke-on-Trent City Council. Within Staffordshire County Council the Archive Service is managed alongside the County Museum Service which is funded by the County Council. The County's Archive Service also manages the William Salt Library on behalf of

the William Salt Library Trust. The Trust is an independent charity.

6. The three services are all managed by the Head of Archives and Heritage and operationally this is the most efficient and beneficial arrangement for users, depositors and visitors to the services.
7. All three services work to a shared vision and forward plan. This is underpinned by a comprehensive set of policies. Many of the policies are shared but some are specific to each individual service. The Archive Service and County Museum are both Accredited services and are required to submit Conservation and Preservation Policies specific to their Accreditation schemes in order to meet the respective standards.
8. The policy complies with best practice for the archive sector and will support the Staffordshire History Centre project. It is recommended that the committee approve the policy which is attached as Appendix 1.

Legal Implications

Where a policy has legal implications, it is referred to the Legal Services within both Staffordshire County Council and Stoke-on-Trent City Council.

Resource and Value for Money Implications

All policies consider resources and value for money as appropriate.

Climate Change Implications

Where appropriate policies consider and mitigate to reduce impact of climate change.

List of Background Documents/Appendices:

Appendix 1 – Staffordshire & Stoke-on-Trent Archive Service: Preservation and Conservation Policy and Strategy

Contact Details

Assistant Director: Catherine Mann MBE, Interim Assistant Director – Culture, Rural and Safer Communities

Report Author: Chris Copp

Job Title:
Heritage

Telephone No.:

E-Mail Address:

Collections Manager, Staffordshire Archives &

01785 895181

chris.copp@staffordshire.gov.uk

Staffordshire and Stoke-on-Trent Archive Service

Preservation and Conservation Policy and Strategy

Name of organisation: Staffordshire and Stoke-on-Trent Archive Service

Name of governing body: Staffordshire County Council

Date on which this policy was approved by governing body: **Insert date**

Date at which this policy is due for review: **Insert date**

Contents

1	Introduction.....	1
2	Definitions.....	2
3	Legislative Framework.....	3
4	Assessment of new accessions	4
5	Buildings and asset management	4
6	Current conservation overview	5
7	Strategic direction.....	6
8	Key strategic objectives.....	7
9	Review date.....	9
10	Appendix 1.....	10
11	Appendix 2.....	11
12	Appendix 3.....	14
13	Appendix 4.....	15

1 Introduction

1.1 Staffordshire Archives and Heritage comprises Staffordshire and Stoke-on-Trent Archive Service, the William Salt Library and the County Museum Service. The Staffordshire and Stoke-on-Trent Archive Service is an Accredited Archive Service administered and funded by Staffordshire County Council and Stoke-on-Trent City Council under a joint agreement. The William Salt Library is a charitable library managed by the Archive Service on behalf of the Trustees. The County Museum is a provisionally Accredited Museum funded by Staffordshire County Council and works in partnership with museums across the region to provide museum development support.

The Archive Service operates Staffordshire Record Office, Stoke-on-Trent City Archives and the William Salt Library. A significant proportion of the County Museum Service's collection is on long term loan and public display at

the National Trust owned Shugborough Estate. The Archive Service provides services for Staffordshire County Council in relation to its legal documents and archives.

The vision is:

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

The mission is:

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.

1.2 The Archive Service acknowledges that the long-term preservation of archives means much more than their immediate rescue from destruction and more than the technical processes of repairing inherent or mechanical damage to prevent further deterioration. Preservation is a holistic activity, which incorporates all the steps necessary to preserve not just the physical item itself and its environment, but also its intellectual content. As an activity, it does not take place in a vacuum but is an intrinsic part of the work of the Archive Service and, as such, is at the forefront of service thinking, planning and delivery. The Archive Service also encourages a strong preservation ethos among its staff and users, which is achieved through the adoption of best practice and through regular staff training.

1.3 The Archive Service is wholly committed to the preservation of the collections in its care by the most appropriate means. Without preservation there can be no access. In order to meet this commitment, the Archive Service will continue to strive to meet nationally defined standards in relation to the storage, preservation and conservation of archives by providing appropriate storage for archive collections; appropriately qualified and competent staff, trained in archive conservation, preservation and management skills; a suitably equipped conservation studio; ongoing staff training to maintain professional competencies and to develop a preservation ethos at all levels; and familiarisation for archive users.

1.4 A major challenge facing the Archive Service is that the number of documents in its care requiring preservation and conservation far exceeds the capacity and resources of the Service to cope with the work required. Further, the whole purpose of preserving archive collections in the first place is to ensure that they can be accessed by the public for the purposes of research. The purpose of this document is to set out a policy and strategy for preservation and conservation for the Joint Archive Service, which seeks to take account of the necessary balance between access and preservation.

1.5 Owners who deposit their documents with the Archive Service are advised of our terms and commitment to their preservation and conservation.

1.6 The preservation of records in digital format is covered in a separate policy.

2 Definitions

For the purposes of this document:

2.1 Preservation

Preservation is defined as the passive protection of an archive where no direct physical or chemical treatment of the item occurs. The control of environmental conditions is included.

2.2 Conservation

Conservation is defined as the active protection of an archive using the minimal physical and chemical treatment necessary to prevent further deterioration and which will not adversely affect the integrity of the original document.

2.3 Surrogacy

Surrogacy is the action of replacing an original with a substitute in either physical or virtual form. Its purpose is to minimise wear and tear and to improve or facilitate public access.

3 Legislative framework

3.1 The Joint Archive Service works within a framework of archive legislation, which applies to the preservation and administration of specific types and series of records.

3.2 The key legislation for local authority archive services is:

The Local Government (Records) Act, 1962, which enables a local authority to acquire records by deposit, gift or purchase and to make such records available for public use

The Local Government Act, 1972, which under Section 224, requires local authorities to make 'proper arrangements' for the care of their own records, historical, semi-current and current.

In addition, under the Public Records Acts, 1958 and 1967, the Staffordshire and Stoke-on-Trent Archive Service is approved by the Lord Chancellor for the deposit of certain classes of local public records as specified by the Acts.

The Tithe Act, 1936 and the Manorial Documents Rules, 1959, provide for tithe and manorial records to be deposited with the Joint Archive Service as approved by the Master of the Rolls.

The Parochial Registers and Records Measure, 1978, amended 1992, provides for the records of Anglican parish churches to be deposited in

repository approved by the relevant diocese, in the case of the Joint Archive Service, the diocese of Lichfield.

4 Assessment of new accessions

4.1 Material entering the Archive Service will be initially assessed, cleaned, where necessary, and packed in suitable archival storage materials before being placed in the repositories.

4.2 Documents displaying signs of infestation, mould damage or volatile formats and will be isolated as appropriate until further action can be taken

4.3 Newly acquired material is assessed for conservation needs as a prelude to the cataloguing process. Material held by the Archive Service is assessed as part of planned survey programmes.

5 Buildings and asset management

5.1 The Archive Service has endeavoured to maintain and improve the quality of its archive buildings and mostly meet the standards set out in PD5454:2012, Guide for the storage and Exhibition of Archival Documents. All the Archive Service buildings are subject to a high level of risk management and their performance in terms of asset management is judged on whether they meet the requisite standards. With the current exception of Stoke-on-Trent City Archives, all have been approved for archival storage by the national archive inspecting bodies.

5.2 Access to the repositories is restricted to staff only, contractors will always be supervised by a member of staff.

5.3 Archival material in repositories are cleaned as part of a regular cleaning programme by staff members or approved cleaning staff.

5.4 Staffordshire Record Office

The Staffordshire Record Office was only the second purpose-built record office in the country. It has been extended three times on its original site, the first extension resulting in a new conservation workshop. An extension in 1980 resulted in the installation of a new fire detection system. In 1994 major alterations to the building included a new air conditioning system in the strong rooms and a substantially upgraded conservation workshop. In 1997 a high sensitivity (early warning) fire detection system was installed in the strong rooms to supplement the existing system.

The extension to the strong rooms, completed in 2002, meets the revised BS5454, Recommendations for the Storage of Archival Documents (2000). It also incorporates dedicated storage for photographic collections.

5.5 Stoke-on-Trent City Archives

Storage facilities for archives are provided at Hanley Library, where Stoke-on-Trent City Archives is based. In 1996 a high sensitivity smoke detection system was installed on Level E and extended to Level A in 1999. Stoke-on-Trent City Archives will be moving from Hanley Library to the Potteries Museum & Art Gallery in 2023. An immediate priority for the Archive Service is to ensure that the necessary adaptations to the new storage areas are carried out when possible.

5.4 William Salt Library

The library is currently in temporary storage at 56 Eastgate Street whilst Staffordshire History Centre project is underway. The repository does not provide optimum conditions for the Archive Service but extra precautions have been taken to protect the library materials with housing and environmental controls. The building is currently running within the parameters of PD545:2012 but some fluctuation occurs at certain parts of the day. This collection will move to new strong rooms at Staffordshire Record Office in 2025.

6 Current conservation overview

6.1 The archive collections in the care of the Archive Service have benefited over many years from the developments outlined above, not least in terms of the encouragement of a holistic approach to preservation management within the Service.

6.2 The Archive Service conservation section and collections management staff follow annual work programmes with set targets for both conservation and preservation, which incorporate longer term projects as well as short-term 'task and finish' projects. A number of long-term projects have been successfully delivered, reinforcing the value of this type of approach.

6.3 Each of the Archive Service's repositories has a pro rata allocation of conservation time which is calculated from available time left when allowances for annual and public leave, sick leave and training have been deducted. The Archive Service also allows approximately one month of time annually for work for the William Salt Library's collections.

6.4 Best practice: standards, principles and processes

The Joint Archive Service recognises, supports and depends upon the standards, principles and ethical requirements implicit in the scheme for the Institute of Conservation. In addition the sharing of best practice is encouraged through the relevant professional groups and an annual CPD programme.

6.5 Standards

All preventative preservation and conservation work is carried out in accordance with BS4971: Repair and Allied Procedures for the Conservation of Documents. This is on the basis of minimal intervention.

6.6 Key concerns to be addressed

Despite the continuity of conservation work within the Archive Service over many years, a huge backlog of work exists at all the Joint Archive Service's repositories. This increases annually as new collections are acquired but has yet to be evaluated in terms of volume. The Joint Archive Service has never undertaken a formal survey of the quantity of archives requiring some form of conservation work. It is assumed that each member of the archive team will record documents requiring treatment as a matter of course and bring them to the attention of the Conservator.

6.7 Continuing developments and improvements in conservation practice, materials and techniques mean that some work, undertaken during the early years of the Archive Service, is now having to be re-evaluated. Treatment is carried out by fully trained staff using up-to-date equipment and techniques. The need to ensure value for money means that current systems need to be refined to set measurable, achievable and challenging targets and to measure performance.

7 Strategic direction

7.1 Strategic Aims

To develop the Staffordshire and Stoke on Trent Archive Service as a centre of excellence for preservation and conservation

To achieve national standards of storage and care at all the Joint Archive Service repositories

To maintain the security of collections

To establish a balance of future work between high priority items, high priority collections and high priority archive types

To create a regular cleaning programme for all repositories in the Joint Archive Service utilising staff, volunteers and externally approved cleaning teams.

To develop further best practice in the management, co-ordination and implementation of conservation and preservation throughout the Joint Archive Service through internal and external training sessions.

8 Key strategic objectives

The aims of the policy will be achieved by the following key objectives:

8.1 To re-define prioritisation criteria and processes for conservation and preservation

8.1.1 It is unrealistic to suppose that all damaged or fragile items in the care of the Service can all be conserved. Therefore, the Archive Service of necessity undertakes a prioritised work programme. At present, items requiring conservation and preservation are identified either as a result of assessing new accessions or as a result of daily use by the public or by staff. A new priority system is in the process of being set up to establish the criteria applied in the assessment of incoming collections. This system will be disseminated through internal training for all staff.

8.1.2 All new accessions will be automatically assessed on arrival at any of the Archive Service repositories. If practicable, a preliminary inspection of the condition will be carried out prior to deposit (externally if a great quantity or are aware of damage which may cause problems in the existing repositories), with a more detailed assessment upon arrival at the repository. The assessment procedure will include cleaning, infestation treatment and an overall condition survey to record packaging and storage requirements in accordance with BS 5454. The information will be then transferred to the preservation programme (see Appendices 3 and 4).

8.1.3 Priorities for conservation are determined using the following criteria:

- Degree of existing damage and potential future deterioration and degradation
- Public demand, both expressed and anticipated
- Historical/legal/administrative significance
- Collections which are owned by the Joint Archive Service
- Suitability for use of surrogates

The condition of some archives on receipt by the Joint Archive Service may necessitate some immediate remedial work.

8.1.4 In determining conservation/preservation priorities from incoming accessions or from items identified through daily use. Assist staff in the technical assessment process, the conservation staff will provide assessment templates.

8.1.5 Staff should not be influenced by pressure from depositors in matters of conservation and should not make unrealistic promises to depositors concerning conservation in order to secure a deposit.

8.1.6 The Head of Archives and Heritage determines the final inclusion of items for conservation in the annual work programme, in consultation with the

Conservator, in relation to technical issues, and in consultation with other members of staff, as necessary.

8.2 Annual work programme

8.2.1 Preservation and Conservation work is carried out according to annual work programmes, which form targets in staff personal performance plans. The programme is determined by the collections manager at each archive and in consultation with the Conservator.

8.2.2 The conservation work programme includes the following: documents identified when in use or requested and exhibition work; responses to pressing reactive work are accommodated where possible; collections coming into the service via the collection policy in which the needs are discussed with Collection Officers.

8.2.3 The preservation work programme includes re-packaging and re-boxing, clear labelling for identification and production purposes. Ongoing effective use of storage space is in effect in collaboration with collection teams.

8.2.4 The range of work carried out in any given year is subject to budgetary provision. A summary of any given year's output is available in the annual report for the Joint Archive Service.

8.3 Preservation and the public service

8.3.1 Guidelines for the safe handling of documents are displayed in all reading rooms. A copy of the Archive Service Code of Conduct and the leaflet, 'In Safe Keeping', which set out guidelines for the handling of original documents is available in the reading rooms. Appropriate aids for using documents, such as perspex book rests and gloves, are provided in all the Archive Service's reading rooms

8.3.2 All staff are provided with a copy of the Information Leaflet 'Handling of Documents by Readers' and receive regular training on how to assist readers with careful handling of archives while in use (see Appendix 1).

8.3.3 As part of its encouragement of a preservation ethos among users, the Archive Service will provide general information sheets for family historians and other researchers who seek advice on preserving family certificates, photographs, letters and other archival material. We will provide outreach sessions on 'Handling of archives' as part of the Staffordshire History Centre project activity programme.

8.4 To provide conservation and preservation advice to external bodies

8.4.1 The Archive Service recognises that it has an expertise and specialism in preservation and conservation, which can benefit other archive holding institutions in the County and the City and can also assist private owners of

archives. This can contribute in the long run towards the preservation of the archival heritage of Staffordshire and Stoke-on-Trent and assist in the outreach programme.

8.4.2 Demands of this nature on conservators' time can be considerable and it is therefore also necessary to introduce some prioritisation into this process.

8.4.3 Priority will be given to institutions and owners who guarantee to provide public access to their collections and to existing depositors. Advice in general terms only can be given to owners, who have no desire or intention to provide public access nor to deposit their collections ultimately with the Archive Service. The Archive Service reserves the right to refuse or to charge such owners for advice or conservation surveys.

8.5 To maintain emergency responses

8.5.1 The Archive Service maintains an Emergency Plan for all of its four repositories and for the William Salt Library, Stafford. The Plan is tested and updated annually.

8.6 Environmental sustainability

8.6.1 The Archive Service's care and conservation work will be underpinned by Staffordshire County Council's Environmental Policy, ensuring that negative effects our activities have on the environment are kept to a minimum, and that wherever possible our environmental footprint is reduced.

9. Review date

9.1 Review date: 28 February 2026

Appendix 1

Care of Documents

Our role is to preserve the archival heritage of Staffordshire and Stoke on Trent and make it available for use.

Please help us to achieve this by following these guidelines:

Readers are responsible for the safety of documents issued to them until they are returned and checked back by a member of staff. Therefore please do not leave documents unattended at any time.

Please handle documents carefully at all times.

Pencils only may be used in the reading rooms.

Please do not mark, annotate or deface documents in any way.

Please do not lean on documents, or rest papers or notepads on them while making notes, nor run fingers down pages or follow text with your finger or a pencil.

Volumes should be placed on a foam support or cushion and should not be kept open for longer than necessary.

Please use a sheet of melinex or perspex to protect maps while consulting them. Rolled maps should be held open by archival weights. Once protected, maps may be traced, using a 2B pencil, with the permission of the reading room staff.

Please use latex gloves when handling parchment documents and cotton gloves when using glass negatives or photographs.

Bundles and file and guarded material will be issued one at a time and are weighed on issue and return. Items in bundles must be kept in the order in which they were received.

Where documents have been microfilmed the surrogate microform copy should be used in place of the original.

Documents may be withheld from public use on preservation grounds if we consider that use of the document will cause further deterioration.

Please tell a member of staff if you find any documents which appear to be misplaced or which you find in a fragile or damaged condition.

Thank you for helping us to preserve Staffordshire's archival Heritage

Appendix 2

Staffordshire and Stoke-on-Trent Archive Service Integrated Pest Management Policy

Integrated pest management (IPM) uses a range of preventive measures to control pests. It significantly reduces the need to use chemicals while providing the same, if not better, level of protection for collections. Research indicates that commonly used chemicals produce adverse effects on archive materials and the people who use them. This knowledge, combined with chemical resistance in pests and environmental concerns, has led to a move away from chemical intervention to control rodent or insect infestation.

How it works

IPM is based on the knowledge of what pests need to survive. Pests are controlled by making the environment around and within the archives hostile to their life cycle. This approach is not pest specific, as many aspects of the program provide protection against a range of biological hazards, for example, good housekeeping can be as effective against mould as it is against rats. In a well-run institution many components of an IPM program will already be in place. Chemical treatments are used only in a crisis situation threatening rapid losses or when pests fail to succumb to more preventive methods.

Pests likely to affect archives

Woodlice, silverfish, moths, spiders and beetles are the most common problems, but it is best to be guarded against any infestations. Moths, ants, and spiders are not likely to damage a paper collection but may attract other pests that do.

Implementation of integrated pest management

Risk assessment

Undertake a thorough inspection of the premises and records to identify any current activity, what it is and where it is located. Local museum or university entomology departments or commercial pest control companies will help you identify any unfamiliar pests. Look for possible entry sites and map the location. Review cleaning procedures and identify any problem areas.

Also examine staff habits and procedures. Do people eat at their desks or store food in offices? Are there flowers or pot plants in collection areas? Make sure your building maintenance procedures are adequate and kept up to date. Monitor the climate and make sure standards are maintained (18-20 °C temperature, 35 - 50 per cent relative humidity). Examine records that are entering the collection for possible infestation.

Once the information is collated it should be possible to identify factors causing or contributing to infestation and take remedial action.

Reporting and inspection

A reporting structure with one person taking responsibility for collating the results, disseminating the information, and coordinating action when required is imperative.

There should be routine annual or quarterly inspections of the building and grounds, with written reports that feed into the maintenance program. A spreadsheet for logging stray sightings should be kept up to date.

Active intervention

Monitoring

It is important to know if pests enter your building. Traps can be used to determine what pests you have, where they are and the size of their population. Mark plans of the building with trap locations and establish reporting structures.

Blunder traps, sticky board and box traps are readily available in the Conservation studio. When using traps, it is important to follow placement guidelines. Traps should be checked monthly, and the catch identified and removed, as full traps are not effective. Increases in activity or changes in species should be noted and followed up to identify the cause and allow remedial action. Traps and lures are also available for flying insects and can be suspended or wall mounted.

What to do if insects are found

If insects are found, identify the source and extent of the problem by using traps and bait stations. Determine whether collection material is at risk or infected and to what extent. If the infestation is collection-based, seal the infected items and remove them to a clean area. Thoroughly clean and remove all debris from the infected site.

Determine the route of entry and/or cause of the infestation and institute remedial action.

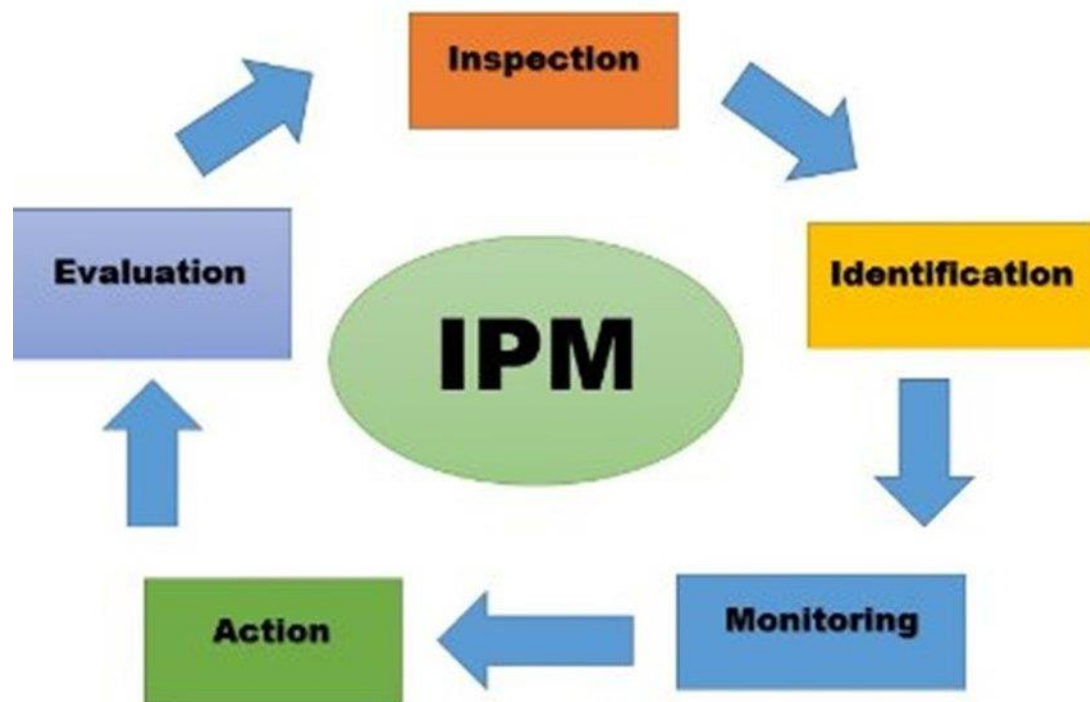
Treat the infected records or area. Depending on the volume of material and type of pest, this can be done in house or by a contracted pest control company. It is important to keep records of actions taken, including details of material treated and chemicals used.

Treatment of records

Cleaning, repairs and/or copying of records will solve the problem of rodent activity because rodents do not leave eggs and larvae behind to reinfest material.

For insects there is a wide range of treatment options including a range of low-toxicity chemicals and chemical-free treatments.

Freezing is very effective against mould, borers, moths and silverfish, and modified environmental controls are successful in relation to most pests with the exception of silverfish. Please seek further advice from Conservation staff. Below is a flow chart that explains the IPM process:



L. Williams

November 2022

Appendix 3

To create Conservation Records on CALM

Go to Archive Menu/Catalogue/Search.

Input Ref number into Any Text Field, bring up the catalogue page

Go to Conservation Priority (if not present, add it in by going to Field/Insert then type-in and select Conservation Priority) write-in Awaiting Conservation.

Go back to Main Menu then Conservation menu/Find Items, from the drop-down options select Awaiting Conservation.

Go to the menu on the left-hand side of the screen, select Transfer Now.

On the Conservation Form add-in missing fields, go to Field/Insert then type-in and select Doc Ref Number and Time Taken.

Appendix 4

DOCUMENTATION RECORD

REFERENCE: _____ DATE IN: _____

BRIEF DESCRIPTION: _____ DATE OUT: _____

MEASUREMENTS (cm): _____ No OF ITEMS: _____

THICKNESS: _____ JOB NO _____

LOCATION: _____ HOURS _____

DOCUMENT TYPE

BOOK	<input type="checkbox"/>	FILE	<input type="checkbox"/>	ROLL	<input type="checkbox"/>	LOOSE	<input type="checkbox"/>
MAP	<input type="checkbox"/>	PRINT	<input type="checkbox"/>	PHOTO	<input type="checkbox"/>	SEAL	<input type="checkbox"/>
TRACING	<input type="checkbox"/>	DRAWING	<input type="checkbox"/>	DEEDS	<input type="checkbox"/>	OTHER	<input type="checkbox"/>

MATERIAL

HANDMADE PAPER	<input type="checkbox"/>	PARCHMENT	<input type="checkbox"/>	LINEN	<input type="checkbox"/>
MACHINE MADE PAPER	<input type="checkbox"/>	VELLUM	<input type="checkbox"/>	SILK	<input type="checkbox"/>
LEATHER	<input type="checkbox"/>	BOOKCLOTH	<input type="checkbox"/>	WOOD	<input type="checkbox"/>

TREATMENTS

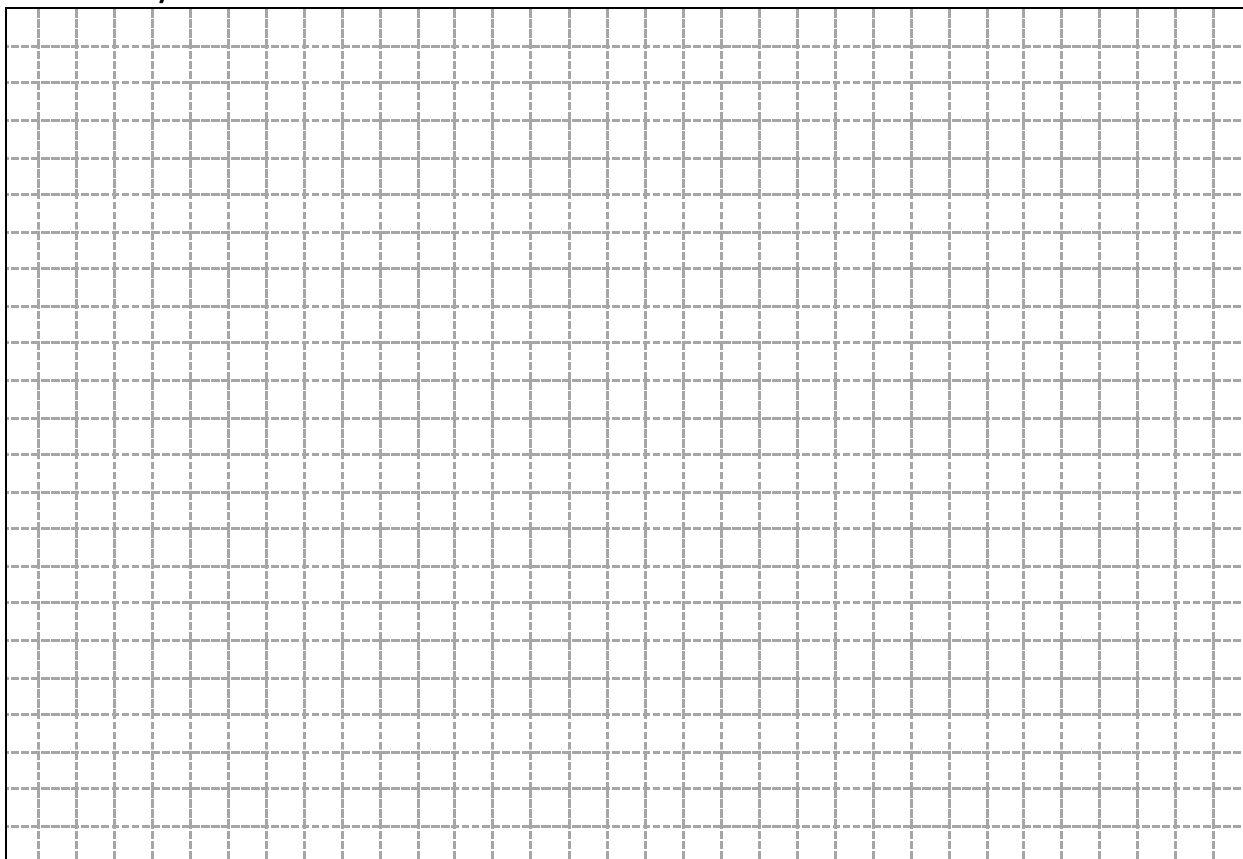
SURFACE CLEANING	<input type="checkbox"/>	HUMIDIFICATION	<input type="checkbox"/>	AQUEOUS CLEANING	<input type="checkbox"/>
DE-ACIDIFICATION	<input type="checkbox"/>	BLEACHING	<input type="checkbox"/>	CONSOLIDATION	<input type="checkbox"/>
ENCAPSULATION	<input type="checkbox"/>	BACKING REMOVAL	<input type="checkbox"/>	LINING	<input type="checkbox"/>

REPAIRS

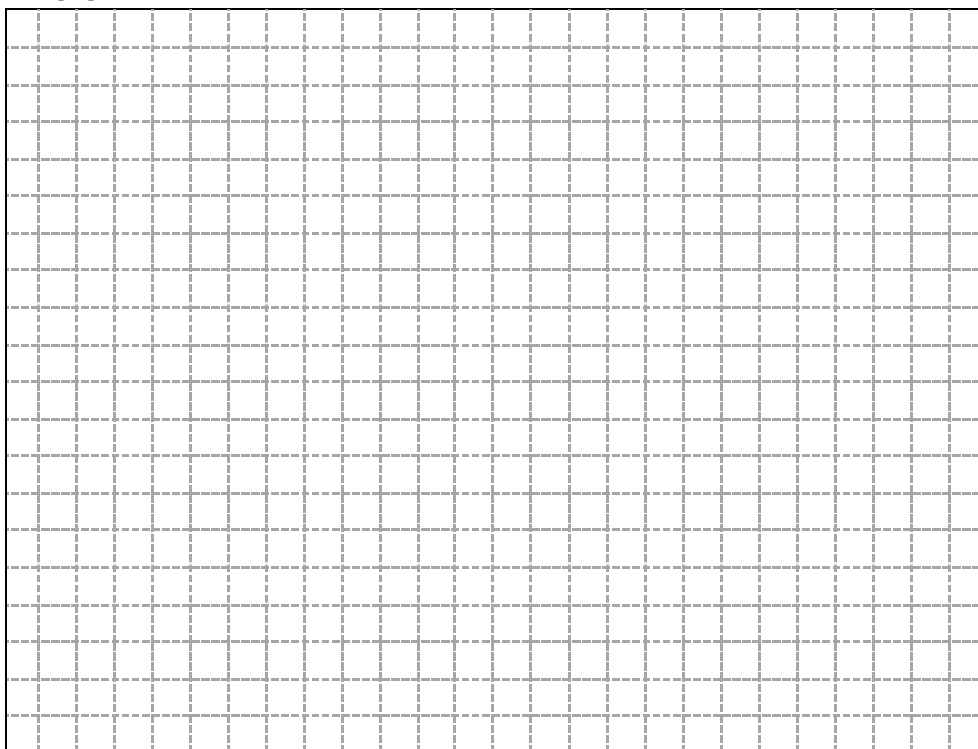
PAPER:	HANDMADE	<input type="checkbox"/>	MACHINE	<input type="checkbox"/>
PARCHMENT:	VELLUM	<input type="checkbox"/>		
TISSUE/THICKNESS:	JAPANESE	<input type="checkbox"/>	LENS	<input type="checkbox"/>
	DRY MOUNT	<input type="checkbox"/>	HEATSET	<input type="checkbox"/>
ADHESIVE:	PVA	<input type="checkbox"/>	ANIMAL	<input type="checkbox"/>
	WHEAT	<input type="checkbox"/>	RICE	<input type="checkbox"/>
	POTATO	<input type="checkbox"/>	GELATINE	<input type="checkbox"/>
	OTHER	<input type="checkbox"/>		

CONSERVATORS COMMENTS:

DIAGRAMS/PHOTOGRAPHS



RECTO



<input type="checkbox"/>	WATER
<input type="checkbox"/>	TEAR
<input type="checkbox"/>	CREASE
<input type="checkbox"/>	MISSING
<input type="checkbox"/>	MOULD
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

CONSERVATOR: _____

Appendix 5

Inventory of Equipment in Conservation Room		
No.	Description of Item	Cost (£ excl. VAT)
1	Board Chopper/Guillotine	£1000
2	Ademco Dry Mounting Press	£1200
3	Cutting Mats x3	300
4	Nipping Presses x3	750
5	Paper trimmer	45
6	Tacking iron x2	126
7	Filing Frame	95
8	Finishing Presses	210
9	Electric Fan x2	60
10	Black and Decker Drill	35
11	Anglepoise Lamp (Magnifying)	167
12	Book Measuring Device	94
13	Magnetic Stirring hot plate	340
14	Cockerell Gold Tooling Stove	135
15	Gold Blocking Press	1260
16	Fume Hood	1747
17	pH Metre	251
18	T-square	35
19	Whirling Hygrometer	47
20	Heavy Duty Stapler	25
21	Water De-ioniser	70
22	Ultra-sonic Welder	850
23	Electronic Weighing Scales	60
24	Still, & Assorted Equipment (for water purification)	977
25	Double Boiler	14
26	Board Creaser	372
27	Nikon F301 Camera (Digital SLR)	800
28	Electronic Eraser	92
29	Leaf Casting Machine	1400
30	Preservation Pencil	695
31	Lux Meter	119
32	Ultra Violet Meter	470
33	Bunsen Burner	50
34	Slide Viewer	46
35	Key box	22
36	Plastic Bins x 12	60
37	Food blender	56
38	Conservac x 2	440
39	Ultra Violet Light	108
40	10pt Handle Letters	360

41	Fillet Roll	80
42	Decorative Tools	160
43	Flash Gun	200
44	Electric Glue Pot	200
45	Digital Thermometer	25
46	Sword Hygrometer	75
47	Microwave Oven	60
48	Dremell Drill	75
49	Sewing Machine	113
50	Tripod	40
51	Ultrasonic Humidifier	123
52	Scanner	150
53	Edge Welding Machine	1165
54	Steam Iron	25
55	Computer	350
56	Kenwood Hand Blender	16
	Total =	£17,840

Local Members Interest
N/A

Staffordshire and Stoke-on-Trent Joint Archive Committee – Tuesday 28 February 2023

Digital Engagement Strategy

Recommendation(s)

1. That the Committee approves the Digital Engagement Strategy

Report of Director for Economy Infrastructure and Skills (Staffordshire County Council) and Director of Strategy and Resources (Stoke-on-Trent City Council)

Reasons for Recommendations:

2. The Digital engagement strategy required updating to ensure that our digital work remains relevant and current in an ever-evolving field.
3. The updated strategy allows the service to highlight areas for improvement and development and make positive changes that will enable the service to reach targets and better meet our audiences and service user's needs.
4. The strategy encourages a cohesive approach across the service and empowers staff to follow best practice.

Background

5. The service has previously been an early adopter of digital engagement and has gradually built an impressive online offer across multiple digital resources. The updated strategy builds upon this earlier work.
6. The service has a strong current digital presence across various platforms including around 17,000 followers on social media. The adoption of the strategy and plan will allow the joint service to develop even further, improve how content is shared and ultimately grow audiences.

7. The strategy recognises the needs of both areas of the joint service, the current digital climate, the value of digital engagement tools and the need to be mindful of accessibility and inclusion.
8. The digital engagement plan sets out in more detail how the service will maintain, manage and develop each of our digital assets and offers:-
 - a. The key priority is to commission a new external website with greatly increased functionality and a user-friendly design.
 - b. Both ICT and Digital teams have been consulted and have advised during the website procurement process. They will be included in the evaluation of bidders, briefing the contractor and testing the product.
 - c. As an interim measure two microsites will be established to effectively communicate with service users and audiences the current progress and goals of the Stoke on Trent City Archives move and the Staffordshire History Centre project.
 - d. The plan covers how we will manage existing digital resources including blogs and social media, external sites and create new digital resources and offers.
9. The strategy includes guidance on how we will monitor our digital performance including that we will review our digital assets annually and archive those that are no longer in active use.
10. The strategy and plan include changes to how we use social media to reach audiences more effectively.
 - a. Best practice guidelines for social media have been created to improve consistency, signpost staff to further resources and minimise potential negative interactions.
 - b. Staff are given clear instructions on how to respond to negative comments or interactions appropriately and how to make post more accessible.
 - c. Guidance and support has been given by the Staffordshire County Council social media manager.
 - d. A content calendar has been implemented to balance social media posts across four themes: sharing collections, celebrating projects, key service messages and marketing & promotion.
 - e. We will prioritise content that celebrates our achievements and shares our collections.
11. The strategy states that we will work safely with children and young people in a digital context by using guidance created by our parent authority and the guidance created by National Lottery Heritage Fund

which can be found here: [Digital guide: working safely online with children and young people | The National Lottery Heritage Fund](#)

12. The strategy complies with best practice for the archive and heritage sector and will support the Staffordshire History Centre project and the Stoke City Archives relocation. It is recommended that the committee approve the strategy which is attached as Appendix 1.

Legal Implications

Where a policy has legal implications, it is referred to the Legal Services within both Staffordshire County Council and Stoke-on-Trent City Council.

Resource and Value for Money Implications

All policies consider resources and value for money as appropriate.

Climate Change Implications

Where appropriate policies consider and mitigate to reduce impact of climate change. As the digital strategy encourages increased use of digital communication it will have a positive impact by reducing the number of physical resources used in communications and marketing.

List of Background Documents/Appendices:

Appendix 1 - Digital Engagement Strategy
Appendix 2 - Digital Engagement Plan
Appendix 3 - Social Media Guidance for AHS Staff

Contact Details

Assistant Director: Catherine Mann MBE, Interim Assistant Director – Culture, Rural and Safer Communities

Report Author: Sarah English
Job Title: Engagement & Access Manager, Staffordshire Archives & Heritage
Telephone No.: 01785 276379
E-Mail Address: sarah.english@staffordshire.gov.uk

Staffordshire Archives and Heritage Service

Digital Engagement Strategy - January 2023

Introduction

1.1 Staffordshire Archives and Heritage comprises Staffordshire and Stoke-on-Trent Archive Service, the William Salt Library and the County Museum Service. The Staffordshire and Stoke-on-Trent Archive Service is an Accredited Archive Service administered and funded by Staffordshire County Council and Stoke-on-Trent City Council under a joint agreement. The William Salt Library is a charitable library managed by the Archive Service on behalf of the Trustees. The County Museum is a provisionally Accredited Museum funded by Staffordshire County Council and works in partnership with museums across the region to provide museum development support.

1.2 The Archive Service operates Staffordshire Record Office, Stoke-on-Trent City Archives and the William Salt Library. A significant proportion of the County Museum Service's collection is on long term loan and public display at the National Trust owned Shugborough Estate. The Archive Service provides services for Staffordshire County Council in relation to its legal documents and archives.

The vision is:

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

The mission is:

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.

Aim of the Strategy

2.1 Whilst delivering major projects a priority for the joint service is seeking new ways of engaging with wider and more diverse audiences. This will allow the service to promote the collections in our care; connect residents to their history, reach new audiences and to raise awareness of new offers. Our visitors, service users and stakeholder's relationship with information, communication and technology is well established and we need to respond to this.

This strategy, in conjunction with the digital engagement plan and supporting documents, aims to provide a cohesive approach to digital engagement for Staffordshire Archives and Heritage. This approach will support the services' wider aims, parent authority direction and current project targets. It builds upon a solid foundation of high-quality previous work that established digital activity and seeks to grow and evolve our

digital engagement, in a way where we consistently seek to improve our offer and follow best practice.

The strategy recognises the following key points:

- a) That the service works jointly but also needs flexibility to meet the needs of two geographically separate bases
- b) That the digital world is growing and evolving at a rapid pace
- c) That digital engagement is a vital tool towards improving inclusion & accessibility
- d) That digital engagement is a resource heavy and specialist form of engagement
- e) That we need to acknowledge and mitigate against digital poverty, low digital confidence and other barriers to online participation

This strategy draws on a previous strategy from 2019, recognised best practice from the archives and museum sector, audience research and parent authority guidance.

Background

- 3.1 According to Avocado Social, 45 million people used social media in the UK in 2021, equating to 67% of the population. This figure has remained steady throughout and following the Covid-19 pandemic, although it is acknowledged that the pandemic created an overwhelming demand for online and digital content. Around 98 percent of all social media usage is on mobile devices and the average user worldwide has six different accounts across several platforms. The fastest growing platform is Tik Tok. [The UK Social Media Statistics for 2021 - Avocado Social](#)

Archives and Heritage Current Digital Services

- 4.1 Currently Staffordshire Archives and Heritage provides (digital) information about the service and its holdings via a variety of different websites and social media platforms and this can be confusing to visitors or users :

4.1.1 County Council Web pages hosted on the main SCC website.
Provides basic information. Unsuitable for engagement or marketing, can be difficult to navigate, doesn't showcase our services or offer.

4.1.2 Staffordshire Past Track
Popular image-based site that holds over 40,000 resources, redesigned in 2015. Has good levels of visitor feedback & engagement. Potential for increased e-commerce.

4.1.3 Online Catalogue – Gateway to the Past
Reliability issues and not user friendly. To be integrated into new website.

4.1.4 Staffordshire Name Indexes

This website gives access to a range of name indexes drawn from the archive collections and used primarily by family historians. Some of which provide completely free information, while others bring in a limited amount of income through copies. New indexes are being added on a regular basis.

4.1.5 FindMyPast

Findmypast is one of the leading commercial online family history providers. The site offers access to images and indexes and is marketed and promoted worldwide. Key Staffordshire family history sources have been digitised and made available through FindMyPast, including parish registers, wills and inventories, and marriage records. It generates significant income for the Service.

4.1.6 Other websites

There are a number of smaller subject focussed websites which are legacies of externally funded projects. These include Staffordshire Views, the Sutherland Collection, the Minton Collection, Children on the Move, Staffordshire Carriages and Meaningful Momentos.

4.1.7 Social Media & Blogs

We manage two Facebook pages, Twitter, Instagram and YouTube accounts, several different themed blog sites plus one current microsite. We currently have 3000 followers on both Facebook & twitter, and just over 1000 on Instagram. The Staffordshire Past Track Facebook page has over 10,000 followers

4.1.8 E-newsletters

We currently share a general service update as an e-newsletter which the public can sign up to via the Staffordshire County Council website. We also send out specialist newsletters to the History Network & our volunteers. These have a combined readership of between 4000 and 7000 people.

Data from 2021/22 shows that we have existing good levels of audience engagement digitally, including:

70,579 website visits per year
22,939 online catalogue visits per year
252,938 Staffordshire Past Track visits per year
89,171 FindMyPast visits per year
12,832 Staffordshire Name Index visits per year

Opportunities

- 5.1 Used creatively and responsibly, digital activity and social media applications can be a valuable tool for engaging audiences.

By exploiting different social media tools and the content they already provide, services can address the following areas of development: Marketing & profile building, Engaging and consulting, Enhancing the learning experience, Celebrating/recording and sharing.

Social media has become strongly associated with marketing and can support us to raise awareness of our visitor offers going forward.

Priorities

- 6.1 Our priority areas of work are set out in the digital engagement plan document. The key developments are to procure a new externally hosted website, implement a social media content calendar and embed hybrid offers in our public programme.
- 6.2 Best practice guidance has been developed to ensure we are keeping up to date with latest developments, using the right tone of voice, creating a balanced content profile, meeting accessibility standards and conversing with the public appropriately. Service guidance will be used alongside parent authority guidance and our work will contribute to parent authority digital engagement and transformation aims.
- 6.3 We will follow digital safety guidance as set out by National Lottery Heritage Fund whilst also following online safety guidance issue by parent authorities (please see supporting documents). These will be referenced in our service service Safeguarding policy & procedures due to be updated summer 2023.
- 6.4 A cohesive approach to branding will ensure that our accounts and platforms are easily recognisable, professional and attractive to visitors and users. Branding of digital assets will be reviewed and updated in Spring 2023 and supporting guidance will be shared.
- 6.5 It is essential that we value digital tools for the additional accessibility that they bring and as such use them in a way that is inclusive.

Measuring performance

- 7.1 It is key that we monitor and respond to changing engagement trends. Digital engagement data is recorded on a rolling monthly basis as part of the reporting requirements of the Staffordshire History Centre project and collated in the annual report.

Social media performance will be reviewed quarterly and changes made in respond to noticeable trends. We will continue to monitor broader trends and audience research to support this. Blogs and microsites will be reviewed annually and archived when no longer required.

Outcomes

- 8.1 By implementing this strategy we will be able to ensure that our digital content is of a high quality, that we meet the needs of our service users, grow our audiences and reach target audiences. We will remain relevant in an increasingly digital world.

Our services cannot and should not exclude audiences engaging with our collections in new ways, whilst recognising that there are areas where digital is not a suitable replacement for physical access or in person engagement. Our digital engagement will be a key tool in meeting our targets and goals over the next three years.

Review

- 9.1 This strategy will be reviewed every three years.

Supporting documents:

Digital Engagement Plan
Social Media Best Practice Guidance
Digital safeguarding guidance – National Lottery Heritage Fund
Staffordshire History Centre Activity plan

Staffordshire Archives & Heritage Service

Digital Engagement Plan 2023-2025

Action	Digital Engagement Activities	Key Milestones	Timescales	Officer responsible
1	Commission new integrated website with online catalogue and other online resources including	<ul style="list-style-type: none"> - Procurement process including market research & evaluating bids - Work with successful bidders & other SCC teams to design a new website as per specification - Testing - Website Launch pre SHC opening 	Spring 2023 Summer 2023 onwards Summer 2024	SE/AHMT/AD/BC/ SCC ICT Digital Team
2	Establish & Maintain Interim Microsites	Create and update project microsites to act as a stop gap before the launch of the new website Archive microsites when new service website launches	Spring 2023 Summer 2024	AD/SE AD/SE
3	County Council website	Maintain up-to-date information and archive out of date pages Ensure SCC webpages direct successfully to new website when launched	Ongoing Summer 2024	HJ / SCC Digital Team SE / SCC Digital Team

4	Gateway to the Past online catalogue	Cataloguing priorities to continue as per the activity plan and the Stoke on Trent Move work New integrated public catalogue included in website procurement	Ongoing	CC / Collections Team SE
5	Staffordshire Pasttrack	Improve purchase facility as part of wider changes to improved purchasing / e-commerce Add new content including enclosure maps & other newly digitised material plus community donations Use & promote as a local history, community engagement and educational resource	Ongoing	CC/SE CC/BC Engagement Team
6	Staffordshire Name Indexes	Volunteer work to continue to add new indexes	Ongoing	CC/volunteer groups
7	Find My Past	Ongoing review of relationship with commercial providers Promote resources through social media etc. in collaboration with library colleagues		JT/AHMT Engagement team
8	Social media	Implement posting schedule & content calendar, use in line with comms plan Monitor and respond to changing audience trends and new platforms Follow service and authority best practice guidance Facebook: Archives and Heritage: news updates; engaging images, marketing Facebook: Staffs Pasttrack: engaging images	Ongoing	SE / Engagement Team Content from all teams

		<p>Twitter: Share collections, project updates, connect with partners etc</p> <p>Instagram: stories & reels to celebrate projects, sharing collections, marketing events via stories</p> <p>YouTube: celebrating projects, educational resources, hybrid offer content, videos as access tools, host exhibition video content</p> <p>Review & update naming, wording, branding & design across all accounts</p>	Summer 2023	SE
9	e-Newsletters	<p>Maintain twice monthly service newsletter with information about service changes; events; projects; SHC developments; etc.</p> <p>Maintain weekly SHN newsletter</p> <p>Maintain seasonal volunteer newsletter</p> <p>Establish termly education newsletter for local schools & teachers</p>	Ongoing	HJ / Engagement team / content from all teams
10	Blogs	<p>Minton Archive Project blog - maintain</p> <p>"A Case for the Ordinary" Project blog – retained as a resource to accompany the exhibition</p> <p>"Bawdy Courts" Project blog – maintained & supported by volunteers</p> <p>The Learning Room – retain as a resource for volunteers & placement students</p> <p>Create a SHC Project progress record</p> <p>Launch Rugeley Power station blog</p>	Ongoing	<p>AD</p> <p>CC/RJ</p> <p>MW/RJ</p> <p>MW/Engagement Team</p> <p>SE</p> <p>CC/AC</p>

11	Digitisation	Ongoing digitisation project strands as set out in the activity plan	In line with SHC Activity Plan	BC/CC
12	Education Resources	Create specific family friendly and curriculum focussed resources to be hosted on the new website / shared on social media to compliment exhibitions, public programme & school offer		ES/SE
13	Training	<ul style="list-style-type: none"> - Staff training to keep knowledge up to date particularly around access and inclusion - Ensure staff follow NLHF guidance & sector best practice including online safety 	Ongoing	All staff
14	Events and Activities	Test and trial hybrid offers and digital alternatives throughout the public programme	Ongoing	Engagement Team

Staffordshire Archives & Heritage – Social Media Guidance

Best practice guidelines are always to be used in conjunction with any authority guidance.

- We use a friendly and positive tone of voice, and we speak to followers with the same professionalism as we would in person
- We only share content from reliable sources and check links before we post
- We use clear language, avoid emojis and add alt text to all images and use camel case for hashtags
- We ignore negative comments unless we need to correct inaccurate statements
- Any harmful, abusive or very negative comments are reported to Engagement & Access Manager who will either respond or escalate to the Social Media Manager for advice
- We follow the content calendar to ensure the themes of our content are balanced and we prioritise content that share our collections and celebrate our projects
- We redirect any archive enquiries to the enquiry email and explain we cannot answer them via social media
- Where possible we use a joint scheduling system (currently hootsuite)
- We tailor our content to the platform we are using
- We continually try to create the best possible content by seeking advice & support from the yammer social media group, comms team resources and the sector specific resources below

Further useful information for staff to refer to:

[Social media \(sharepoint.com\)](#) – social media etiquette document

[Social media guides for museums – Collections Trust](#)

[Resources | The Audience Agency](#)

[Guide to accessible social media | RNIB](#)

Local Members Interest
N/A

Staffordshire and Stoke on Trent Joint Archive Committee – Tuesday 28 February 2023

Staffordshire and Stoke-on-Trent Archive Service and Staffordshire Archives and Heritage Service: Predicted performance outturn 2022/2023

Recommendation(s)

That the Committee:

- a. Notes predicted performance outturn for the service.

**Report of Director for Economy, Infrastructure and Skills
Staffordshire County Council) and Director of Strategy and
Resources (Stoke on Trent City Council)**

Reasons for Recommendations:

1. The Joint Archive Service works to a three-year planning cycle. In 2015 a ten-year vision for the service was approved with regular reviews. The current Forward Plan was reviewed and approved on 25 February 2021. An annual service delivery plan is produced by the service to identify key workstreams and monitor progress towards targets. A summary of progress and the predicted outturn is given below for key areas of work under each service demand.

Service demand 1: Active Partnership

2. The Staffordshire History Centre development trust has been registered with its initial trustees. A first meeting and recruitment for further trustees is planned for spring 2023.
3. Work to support two regional museum networks (Ironbridge Gorge Museum Development and Marches Network) is being scaled back. This enables the Archives and Heritage team to focus on the Staffordshire History Network.
4. The partnerships with the universities of Keele, Nottingham and Liverpool continue to flourish. Two Collaborative PhD students from Keele have

started their projects focused on widening access to the service collections for diverse communities.

5. The CLANDAGE project on changing climate in Staffordshire with Liverpool University has delivered a study day, book launch, and pop up exhibition touring libraries. The project completes in March and has made good links with communities working with storyteller to create YouTube videos on the [Burton Washlands](#).
6. The History Access Point at Lichfield Library and The Hub has fully reopened with drop in use re-established. Support has been provided for the Service friends groups. New partnerships have been established through the launch of the Staffordshire History Network in July 2022. 37 organisations are represented and 412 individuals are subscribed to the weekly newsletter. The Stoke Archives Service Manager provides support for the New Victoria Theatre Archive Committee and attends the annual meeting.
7. The volunteer policies for adults were reviewed and approved by the Joint Archives Committee in August 2022. Recruitment to new roles has commenced including digitisation and stewarding for store tours. Onsite volunteering and student placements have been re-established at Stoke. Their work is supporting preparation for the relocation of the City Archives.

Service demand 2: sustainability and resilience

8. Four new project posts were appointed in October 2022 and Stoke-on-Trent City Archives has filled all its vacancies. The service budget is predicted to break even.
9. Four fundraising bids were successful including: Heritage Fund grant uplift, UK Shared Prosperity Fund through Stafford Borough Council, Wolfson Foundation and Staffordshire County Council's Climate Change fund. In total an additional £1.289 million of external funding has been secured to enable the Staffordshire History Centre construction to commence.
10. The Joint Archive Service was fully accredited by the Archive Service Accreditation panel in November 2022. The Panel *"... recognised that the service is in the midst of significant change and transformation. This had been complex but demonstrably well managed in maintaining an effective service and retaining a clear sense of mission throughout."* The service is accredited until November 2024 when it will be due for a full assessment.
11. The Pandemic War Diary project to record Staffordshire County Council's experience of COVID-19 has made good progress. Thirteen

interviews out of thirty-five have been completed with four fully transcribed. The Rugeley Power Station project to catalogue the archive and develop an exhibition is also progressing with appointment of an exhibition designer.

12. Staffordshire's Archive and Heritage Service moved out of Staffordshire Record Office and the William Salt Library sites to temporary accommodation in Eastgate Street. Stoke-on-Trent City Archives is planning for relocation to the Potteries Museum and Art Gallery with a substantial amount of work to repackage the collection being completed. Both services have implemented a model for public access during the relocation projects.

Service demand 3: Diversified users, stakeholders and collections

13. The Service delivered the Staffordshire History Day online attracting over 100 participants. It also participated in the Staffordshire History Festival with a significant response to the behind-the-scenes tours delivered.
14. The Staffordshire History Centre Activity Plan has been simplified and numerous events delivered; a History Network established, and a teacher's network created. From April to December 2022 the project team have delivered 36 activities and engaged 1000 participants. Four student placements have been completed.
15. The interpretation consultants have been procured and have started to develop detailed designs for the exhibition space. A teacher's network has been established and student placements have been implemented.

Service demand 4: Share knowledge across the sector

16. The service has continued to participate in regional networks such as Archives West Midlands and the Marches Network. Team members presented at conferences.
17. The service also supported the German War Graves Exhibition identifying venues and liaising with the German Volksbund. The exhibition launched in June and is touring several venues in Staffordshire before being permanently displayed at the German War Graves centre on Cannock Chase.

Service demand 5: Increased online activity

18. Work has continued on digitisation of collections with 850 images added to Staffordshire Past Track and two new indexes to the

Staffordshire Name Indexes websites. Work has begun to procure the new service website but been delayed due to procurement and ICT issues.. 200 Enclosure maps were digitised with 42 available on Past Track to date.

19. New branding has been implemented across the service social media being well received by service users.

Performance targets

20. Key performance statistics have been provided based on the quarter three figures estimating the year end outturn. Volunteer hours are predicted to increase compared to last year as are physical engagements with the service. Digital engagement has decreased mainly due to changes in the way analytic data is collected. It also reflects the recovery of physical activity and a shift away from wholly online engagement during the COVID-19 pandemic.

Performance measure	Predicted outturn 2022-2023	Outturn 2021-2022
Volunteer hours	3,800	3,607
Percentage of collections with a collection-level description online	100%	100%
Accreditation status	Archives full Museums provisional	Archives full Museums provisional
Organisations engaged with in advisory capacity	420	Not recorded
Engagement with the service	1,300	330
Digital engagement	665,000* changes to analytics collection	2,101,110

Legal Implications

The work of the Archive Service is governed by the Joint Agreement and other legislation to enable both authorities to meet their legal obligations.

Resource and Value for Money Implications

The service has a forecast to break even for 2022/23.

Climate Change Implications

The work of the service balances online access and physical access to services and collections to offer options for remote use and not necessarily travel to multiple locations.

List of Background Documents/Appendices:

Service delivery plan 2022/2023

Contact Details

Assistant Director: Catherine Mann MBE, Interim Assistant Director – Culture, Rural and Safer Communities

Report Author: Joanna Terry
Job Title: Head of Archives and Heritage
Telephone No.: 01785 278370
E-Mail Address: joanna.terry@staffordshire.gov.uk

Not for publication by virtue of paragraph(s) 2, 3, 4
of Part 1 of Schedule 12A
of the Local Government Act 1972

Document is Restricted

