

Staffordshire and Stoke-on-Trent Joint Archives Committee

Tuesday 27 February 2024

10:30

Oak Room, County Buildings, Stafford

John Tradewell
Deputy Chief Executive and Director for Corporate Services
19 February 2024

Agenda

1. **Apologies**
2. **Declarations of Interest in accordance with Standing Order 16**
3. **Minutes of the meeting held on 2 August 2023** (Pages 5 - 8)
4. **Decisions taken outside of the Committee Meeting**
5. **Staffordshire History Centre Project - Update** (Pages 9 - 14)

Joint Report of Director for Economy, Infrastructure and Skills (Staffordshire County Council) and Director of Strategy and Resources (Stoke on-Trent-City Council)
6. **Joint Archive Service - Predicted Outturn 2023/24 and 2024/25 Net Revenue Budget** (Pages 15 - 26)

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)
7. **Disposals from Staffordshire Archive Collections** (Pages 27 - 46)

Joint report of the Director for Economy Infrastructure and Skills (Staffordshire County

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

8. **Stoke-on-Trent City Archives Move Update** (Pages 47 - 52)

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

9. **Website Procurement** (Pages 53 - 56)

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

10. **Predicted Performance Outturn 2023/24 and Benchmarking with Comparator Archive Services** (Pages 57 - 78)

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

11. **Date of next meeting -**

Thursday 20th June 2024 10:30am. Venue to be confirmed.

12. **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 exempt)

Membership	
Mark Sutton	Alastair Watson
Victoria Wilson	

Notes for Members of the Press and Public

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 2 August 2023

Present:

Attendance	
Mark Sutton	David Williams (Substitute)
Victoria Wilson	

Note – Reference in these minutes to ‘Lead Officers’ relates to the Director for Economy, Infrastructure and Skills (Staffordshire County Council), the Deputy Chief Executive and Director for Corporate Services (Staffordshire County Council) and the Director for Strategy and Resources (Stoke-on-Trent City Council).

Apologies: Alastair Watson

Part One

25. Appointment of Chairman and Vice-Chairman

Resolved – That County Councillor Victoria Wilson be appointed Chairman of the Committee until the 2024 Annual meeting (Vice-Chairmanship to be taken by the City Council representative).

26. Declarations of Interest in accordance with Standing Order 16

There were no declarations of interest on this occasion.

27. Minutes of the meeting held on 28 February 2023

Resolved – that the minutes of the meeting held on 28 February 2023 be confirmed and signed by the Chairman.

28. Staffordshire History Centre update

The Committee considered a report by the Lead Officers on the progress of the development of the Staffordshire History Centre which would bring together the Staffordshire Records Office and the County Council’s Archives Service.

Activities continued to be delivered with highlights being the successful ‘Case for the Ordinary’ touring exhibition on the patients’ experience in the County’s three asylums, and the new Rugeley Power Station exhibition at the Cannock Chase Museum.

Volunteers continued to play a vital role in delivering services and supporting the development of the new Centre with 69 volunteers donating £80,490 worth of resource which contributed to the match funding arrangements for the project.

Construction works were on schedule with additional work which had been identified being funded from contingency budgets and not expected to cause any overall delay.

A full procurement process was underway for the new website for the Centre, in the meantime a microsite had been launched to ensure continuity of service information to the public and to promote public interest in the development works.

Concluding, the Lead Officers reported on funding claims submitted in relation to the £520,000 spend to date, commenting on the positive feedback received from the Heritage Fund on both the standard of funding claims and the work being undertaken with young people.

The Chairman made particular reference to the pleasing progress of the construction works, welcoming the introduction of a timelapse camera to promote public engagement.

Resolved – That the Update report be noted.

29. Joint Archive Service - Final Outturn 2022/23 & Predicted Outturn 2023/24

Lead Officers reported on the Joint Archive Service's final outturn for 2022/23 and predicted outturn for 2023/24.

For 2022/23 details were given of each Council's core services and site and public services budgets and the transfers between the two Councils which had resulted in an overall breakeven position for the £0.843m revenue budget.

2022/23 Reserves totalled £0.438m spread between the General Reserve, Archive Acquisition Reserve and a specific reserve fund for the Minton Collection.

From spend to date it was predicted that for 2023/24 a breakeven position would again be achieved. If necessary, transfers from Reserves would be made to meet the agreed budget of £0.878m which was an increase of £0.035m on the previous year's allocation.

Resolved – That the Final outturn for 2022/23 and predicted outturn for 2023/24 be noted.

30. Staffordshire and Stoke-on-Trent Joint Archive Committee - Annual Report

Members received a detailed presentation on the 2022/23 Annual Report for the Joint Archives Service.

The report portrayed the positivity which existed throughout the service in terms of the development of, and preparations for transition to, the new History Centre, increased public engagement (back to pre-COVID pandemic levels), and improved support for volunteers. On the latter, reference was made to the success of work on developing the offer to volunteers and introduction of a volunteers' event programme.

The report incorporated the Risk Register, updates to which included reference to lone working procedures and changes to reflect the new storage arrangements in place at City Archives to mitigate flood risk.

Responding to a member query regarding the source of benchmarking information and Performance Indicators, it was explained that the previous benchmarking exercise by CIPFA had ceased and recently replaced by a National Archives Organisation survey, the results of which would be analysed and reported to a future Joint Committee meeting.

Resolved– That the Annual Report be noted and a report be submitted to a future meeting on up to date comparator information.

(Note by Clerk- Following the meeting comparative figures of engagement were provided:

Year	No. of Participants
2019/20	659
2022/23	1,868

An increase of 183%)

31. Joint Archive Service - Appraisal and Disposal Policy and Collections Information Policy

In line with best practice a 5 yearly review had been carried out of both the Appraisal and Disposal Policy and the Collections Information Policy.

Revised draft policies were submitted:

Appraisal and Disposal Policy – Possessing an up to date policy contributed to the accreditation process. This key document serves to support Archivists in determining long term value/relevance of documents and provides a criteria for deciding whether offers should be accepted.

Collections Information Policy – Requires the holding of information on each item in the collection including proof of ownership, its location and movement control.

Resolved – That the updated Appraisal and Disposal Policy and Collections Information Policy be approved.

32. Date of next meeting

Monday 20 November 2023 – 10.30am.
Venue – County Buildings, Stafford

33. Exclusion of the Public

Resolved – That the public be excluded from the meeting for the following item of business which involves the likely disclosure of exempt information as defined in the paragraph of Part 1 of Schedule 12A (as amended) of the Local Government Act 1972 indicated below.

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

The Chairman requested the submission of an open, written report to the next Joint Committee meeting on the progress on the relocation of the Stoke-on-Trent City Archives Service.

For the City Council, Councillor Williams agreed to arrange for a report to be submitted.

Resolved – that an update report be submitted for inclusion in the open section of the agenda for the next Joint Committee meeting.

Chair

Local Members Interest
N/A

**Staffordshire and Stoke-on-Trent Joint Archive
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Staffordshire History Centre Update

Recommendation(s)

That the Committee note:

- a. The progress update for the project.

**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:

The Joint Archives Committee was updated on progress of the project at the meeting on 2 August 2023. This report brings an update on progress of the activities programme, procurement, and the timeline for the project.

Progress update on activities

1. From April to December 2023 the project team have delivered 54 activities and engaged 2,461 participants. During the Summer the Service delivered the Archive Animals events at six libraries across Staffordshire. The event engaged families in creative activities to design a museum, learn about the collection and take part in interactive storytelling. The feedback is being used to shape the interpretation content at the History Centre. Other events included co-curation outreach for the food themed touring exhibition with a Holiday and Activities and Food (HAF) group; the Staffordshire History Festival and walking tours of Eastgate Street.
2. The co-curation and production model was shared at a West Midlands Museum Development conference. It has been praised by both the National Lottery Heritage Fund and attendees at the conference for its innovative approach to genuinely engage young people in selecting items to feature in exhibitions and activities.

3. Five student placements have been completed and all slots are booked for 2024. Partnership work with the North Staffordshire College Group continues and new model is in place to reach each new KS5 year group. A new project is underway with Abbots Bromley Primary School to create video content for the interpretation. Eighteen school sessions have been delivered on and offsite and 1208 pupils engaged up to December 2023. This is 26% of the target figure. There are 58 teachers engaged in the schools' network. The first term of the adult learning course, *Knowing where you stand*, has completed and the second term has started. Evaluation provided positive feedback with 10 attendees in the first term and 9 continuing the second term.
4. Two community projects are underway. The first is working with collaborative doctoral award student on their project to raise aware of black history collections. The student is managing a volunteer group to identify relevant material. The second is the Eastern European recipe book project for which further research has been completed. The project team are also supporting the Staffordshire Poet Laureate in creation of a research group looking LGBTQ+ history.
5. 'A Case for the Ordinary' Asylums exhibition closed at the Ancient High House, Stafford on 12 Dec 2023 (addition to original programme). Rugeley Power Station and Climate Change pop-up exhibitions are continuing to tour libraries and community venues during 2024. Formal and informal learning resources have been developed to accompany 'Beneath our Feet' touring exhibition, which opened at the Ancient High House, Stafford, on 27 Jan 2024. Work with three community groups to co-curate content and interpretation for the touring food exhibition, 'Knowing Your Onions' is planned for late 2024. Initial planning for the 2025 touring exhibitions including 'A Day at the Seaside' and another on the archaeological discoveries at the History Centre site is underway. There have been 82,208 visitors to our touring exhibitions up to December 2023.
6. Digitisation of collections is continuing with 317 photos from McCann collection complete and 480 transparencies from Michael Fisher collection digitised by volunteers. 7,000 photographs from the 1948 Staffordshire aerial survey are being digitised by Icam. These will be geo-referenced and made available on Staffordshire Past Track during 2024.
7. To the end of December 2023, a total of 7,446 books and pamphlets have been catalogued by the project cataloguer, Collections Officer and volunteers (62% of target). 564 Name Authorities have been created by the project cataloguer.

8. In total, 88 volunteers are working on the project to index, catalogue, digitise, research, and preserve our collections. Up to December 2023 they have donated 2,684.5 hours which equates to £53,690 (based on the Heritage Fund rate of £20 per hour for skilled volunteers) in matched funding for the project during 2023-2024.

Progress update on capital work

9. Construction progress continues with some areas showing a slight delay on programme. The strong room concrete slabs are complete to the roof. There have been delays to the brickwork due to bad weather.
10. Refurbishment and reconfiguration of the Staffordshire Record Office is progressing well. Partitioning, plastering and screeding work in public areas is complete and the mains gas is connected. Redecoration is underway and this area is on schedule.
11. Work on the Covered Courtyard has had some issues with wet weather affecting the timbers, but this has been resolved. There were delays to delivery of the Bauder system, but this has now been installed. There are some delays in the exhibition area, but it is overall on schedule.
12. Separation of the William Salt Library building is complete except for a first-floor link to enable work to progress. Refurbishment and restoration of the building is continuing. Structural work to the walls and basement has been completed. Roof repairs will also be carried out to the library building. There are delays in this area due to listed building consent requirement, but this is not time critical.
13. Work is progressing on digital interpretation, with Imagemakers and WideSky. Initial designs for digital labels three digital interactives and the welcome screen have been developed with pilot content. The digital and analogue interactives will be tested with family audiences. Work on developing the audio tour and accessible versions thereof is underway, working with community and access groups. Object and document lists have been finalised and work is progressing on labels and organisation of items within the curated wall display.

Progress reports to NLHF and programme

14. Six progress reports and claims have been submitted to the National Lottery Heritage Fund (NLHF). An update on the costs and grant payments will be brought to the next Committee once work on the end of financial year has been completed.

15. The NLHF mentors and Senior Investment Manager visited the site in October and were impressed with progress. At the most recent meeting in January, they commented that the project was being delivered very well and the team worked in a collaborative manner. The mentor for the activities was very complimentary on the co-production work to develop school and family activities.

16. Based on the revised programme from commencement of construction on 1 February 2023 the project is on schedule. Construction is estimated to complete in summer 2024 with anticipated opening date of autumn 2024.

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:

National Lottery Heritage Fund progress reports
Staffordshire History Centre data collection spreadsheets.

Contact Details

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Local Members Interest
N/A

Staffordshire and Stoke on Trent Joint Archives Committee – Tuesday 27 February 2024

Joint Archive Service – Predicted Outturn 2023/24 & 2024/25 Net Revenue Budget

Recommendations

We recommend that the Committee:

- a. Notes the current 2023/24 net revenue outturn budget position.
- b. Notes a transfer of £0.001m into Staffordshire County Council’s general reserve towards New Burdens Funding.
- c. Notes a transfer of £0.196m into Staffordshire County Council’s general reserve towards the Staffordshire History Centre Project, to be used for any additional costs associated with the project.
- d. Approves a transfer from Stoke-on-Trent’s general reserve of £0.027m as a contribution towards the Archives service move.
- e. Approves a transfer from Stoke-on-Trent’s general reserve of £0.010m as a contribution towards the microfilm cabinets and reading room photo frames.
- f. Approves the indicative 2024/25 net revenue budget.
- g. Approves a transfer from Stoke-on-Trent’s general reserve of £0.011m in 2024/25 to fund the projected budget shortfall.

Report of Director of Finance (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 2023/24 financial year.
2. The partnership continues to hold significant reserves totalling £0.439m. This includes:
 - a. The General Reserve holds a balance of £0.371m.

- 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 2023/24

- 3. The detail of the 2023/24 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 £0.720m, 81% of the current net revenue budget of £0.890m. Latest forecast is for an overall breakeven position for this year as follows:

Core Services

- 5. £0.018m underspend, of which £0.025m is as a result of savings against employee, training, transport, general expenditure budgets and an over achievement of income against Staffordshire County Council which is offset by an overspend of £0.007m against Stoke-on-Trent employee costs.
- 6. It is assumed that the overall underspend of £0.018m will be transferred to the respective reserves, with the split £0.025m underspend for Staffordshire County Council and the £0.007m overspend 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 £0.005m as a result of an overspend against employees of £0.009m and an under-achievement of income of £0.005m, which is partially offset by savings against training, transport and general expenditure budgets of £0.009m.
- 8. Stoke-on-Trent sites and public services; underspend of £0.003m as a result of an overspend against employees of £0.006 which is offset by savings against training, transport and general expenditure budgets of £0.009m.
- 9. It is assumed that the overall underspend for Staffordshire County Council of £0.020m will be transferred to their reserve and the overall overspend for Stoke-on-Trent of £0.004m will be transferred from their reserve at year end to provide, overall, for a breakeven budget.

Reserves

10. The Joint Archive Service currently holds three reserves totalling £0.439m and set out in *Appendix 2*. This is made up of:
 - a. The General Reserve which currently has a balance of £0.371m. This includes a transfer to Staffordshire County Council general reserve of £0.001m for New Burdens funding.
 - 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 2023/24 available for use will be c £0.614m, around £0.175m more than the current balance. This assumes in 2023/24:
 - a. Transfer to Staffordshire County Council general reserve underspend; £0.020m.
 - b. Transfer to Staffordshire County Council general reserve £0.196m as contingency for use on the History Centre project.
 - c. Transfer from reserve of the Stoke-on-Trent general reserve overspend; £0.004m.
 - d. Transfer from reserve of the Stoke-on-Trent general reserve contribution towards Archives services moving costs; £0.027m.
 - e. Transfer from reserve of the Stoke-on-Trent general reserve contribution towards microfilm cabinets and reading room photo frames costs; £0.010m.

Net Revenue Indicative Budget 2024/25

12. The detail of the 2024/25 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 £0.689m (74% of the total JAC budget) whilst the Stoke on Trent City Council's budget has been set at £0.238m (26% of the total JAC budget).

14. The total joint Archives Service's budget for 2024/25 is £0.927m, an increase of £0.038m from 2023/24 budget.

15. Staffordshire County Council's budget has been uplifted by £0.033m and has had inflationary increase to reflect additional costs associated with national insurance and pension contributions. It also includes the provision for pay awards for 24/25 of 3%. All non-employee income and expenditure budgets have received a 2% inflationary uplift too.

16. Stoke-on-Trent's budget has been uplifted by £0.005m. The actual indicative budget requirement uplift was calculated to be £0.016m, this included inflationary increases to reflect additional costs associated with national insurance and pension contributions. It also includes the provision of 4% for the 24/25 pay award. All non-employee income and expenditure budgets have not received any inflationary increase and remain as the 23/24 budget. Stoke-on-Trent City Council have only agreed to fund £0.005m of the £0.016m increase, therefore the indicative budget presented does not reflect £0.011m for inflationary increased associated with employee costs.
17. It is requested that the Joint Archives Committee approve a transfer from the general reserve of £0.011m in order for the budget to be increased to accommodate the inflationary increases for employee costs. If this is not agreed, then the budget will overspend by £0.011m.

Legal Implications

18. The Joint Archive Agreement budget will be subject to an annual Audit and return.
19. A review of the current Joint Agreement.

Resource and Value for Money Implications

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

Climate Change Implications

21. No significant implications.

List of Background Documents/Appendices:

Joint and Other Archive Services 2023/2024 & 2024/2025 Budget File.
Joint Archives Reserves File.

Appendix 1 - Predicted Outturn Position 2023/24
Appendix 2 - Archives Reserves
Appendix 3 - Budget 2024/25

Contact Details

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**Joint Archives Service
Predicted Outturn Position 2023-2024**

	Core Services			Staffordshire County Council Sites and Public Services			Stoke-on-Trent City Council Sites and Public Services			Total for Service		
	Current Budget	Actual Expenditure @ Feb-2024	Predicted Outturn	Current Budget	Actual Expenditure @ Feb-2024	Predicted Outturn	Current Budget	Actual Expenditure @ Feb-2024	Predicted Outturn	Current Budget	Actual Expenditure @ Feb-2024	Predicted Outturn
	£	£	£	£	£	£	£	£	£	£	£	£
Expenditure												
Employees	358,270	261,879	355,577	328,800	311,105	337,603	162,700	132,742	169,482	849,770	705,726	862,662
Training	1,650	514	660	3,350	1,043	1,340	900	0	100	5,900	1,557	2,100
Transport	1,330	948	890	2,700	1,925	1,810	300	0	30	4,330	2,874	2,730
Supplies & Services	12,040	5,113	9,040	24,450	10,381	18,350	19,700	7,971	10,628	56,190	23,466	38,018
Transfer to Reserve	0	0	18,389	0	0	-4,866	0	0	2,960	0	0	16,483
Total Expenditure	373,290	268,454	384,556	359,300	324,456	354,237	183,600	140,713	183,200	916,190	733,623	921,993
Income												
Grants & Reimbursements	0	0	0	0	0	0	200	0	100	200	0	100
Sales	0	0	0	9,760	5,194	6,214	400	42	100	10,160	5,236	6,314
Fees & Charges	0	0	0	7,360	4,800	7,223	2,400	1,818	2,400	9,760	6,618	9,623
Miscellaneous	2,530	0	13,796	3,780	2,164	2,400	0	0	0	6,310	2,164	16,196
Total Income	2,530	0	13,796	20,900	12,158	15,837	3,000	1,860	2,600	26,430	14,018	32,233
Net Expenditure	370,760	268,454	370,760	338,400	312,297	338,400	180,600	138,853	180,600	889,760	719,605	889,760

Predicted Under/Overspend **0**

Joint Archives Reserves

	Staffordshire County Council £	Stoke on Trent City Council £	Total £
<u>General Reserve</u>			
Balance brought forward 1 April 2023	232,373	137,437	369,810
2023-2024 Transactions			
New Burdens Funding	729		729
Subtotal (balance as at 31 March 2024)	233,102	137,437	370,539
<u>Future Transactions</u>			
Forecast Overspend from Reserve	0	-3,870	-3,870
Forecast Underspend to Reserve	20,352		20,352
Staffordshire History Centre Project - Contingency	196,000		196,000
Stoke contribution to Archives moving costs		-27,000	-27,000
Microfilm Cabinets & Reading Room Photo Frames		-10,300	-10,300
Balance Available (as at 31 March 2024)	449,454	96,267	545,721
<u>Acquisition Reserve</u>			
Balance brought forward 1 April 2023	57,542	0	57,542
2023/2024 Transactions			0
Subtotal (balance as at 31 March 2024)	57,542	0	57,542
<u>Future Transactions</u>			
			0
Balance Available (as at 31 March 2024)	57,542	0	57,542
<u>Art Fund Grant - Minton</u>			
Balance brought forward 1 April 2023	0	10,301	10,301
2023/2024 Transactions			0
Art Fund Grant - Minton Archive			0
Subtotal (balance as at 31 March 2024)	0	10,301	10,301
<u>Future Transactions</u>			
Balance Available (as at 31 March 2024)	0	10,301	10,301
<u>Grand Total</u>			
Balance at 31 March 2024	290,644	147,738	438,382
Forecast Balance at 31 March 2024	506,996	106,568	613,564

Notes:

**Joint Archives Service
Budget 2024-25**

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	370,390	355,180	177,900	903,470
Training	920	1,080	900	2,900
Transport	1,890	2,220	300	4,410
Supplies & Services	11,590	25,190	15,700	52,480
Total Expenditure	384,790	383,670	194,800	963,260
Income				
Grants & Reimbursements	0	0	200	200
Sales	0	9,950	400	10,350
Fees & Charges	0	5,940	1,900	7,840
Miscellaneous	2,570	3,860	11,000	17,430
Total Income	2,570	19,750	13,500	35,820
Net Expenditure	382,220	363,920	181,300	927,440

Funded by:	Staffordshire	689,340	74%
	Stoke-on-Trent	238,100	26%
		927,440	

Local Members Interest
N/A

Staffordshire and Stoke-on-Trent Joint Archive Committee

– Tuesday 27 February 2024

Disposals from Staffordshire Archive Collections

Recommendation(s)

- a. That the committee approves the transfer and disposal of archive collections identified through the reappraisal process.

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. Following reappraisal of several collections held at Staffordshire Record Office several items for transfer or disposal have been identified.
2. In accordance with the Staffordshire and Stoke-on-Trent Archive Service's Collections Development Policy, permission must be sought from the Joint Archive Committee before any item is transferred or disposed of from the collection.

Background

3. Reviews of collections take place to ensure that our collections continue to meet the criteria of the Collections Development Policy. Staffordshire and Stoke-on-Trent Archive Service regularly reviews collections to ensure we are making best use of archival storage for the care of existing collections and to enable further accessions to be received.
4. This report covers recent reappraisals of several collections completed by the Collections Officers which has identified material to be transferred or destroyed.
5. Firstly, twenty small collections (or part thereof) have been identified as duplicates. The majority of these collections were identified during retrospective inputting of older catalogues 2020-2021, and were not input into the online catalogue pending disposal. They consist mainly of

photocopies of items subsequently donated or deposited as originals, some are duplicate printed items. See Appendix 1.

6. Secondly, eight small collections (or part thereof) have been identified as not relating to Staffordshire. The majority of these collections were identified during retrospective inputting of older catalogues 2020-2021, and were not input into the online catalogue pending disposal. See Appendix 2.
7. Thirdly, published books, copies of Church Bells periodical (later Church Bells and Illustrated News) 1870-1905 (34 volumes). This was a national publication, other sets are known to exist, and is outside the collecting policy of both the Archive and Heritage Service and the William Salt Library. See Appendix 3.
8. Fourthly, Duplicate Ordnance Survey sheets which are unannotated (unmarked with any additional information). Most of these were identified as duplicates or not relating to Staffordshire many years ago and were bundled together and have been stored off-site ever since. The maps generally come from deposited collections but some are from defunct businesses or from collections which have since been purchased by Staffordshire County Council. See Appendix 4.
9. Fifthly, five boxes of research notes of E Surrey Dane for his Sheffield University MA thesis "The Economic History of the Staffordshire Pottery Industry to 1850" (1950). The City Archives have a copy of the thesis, and the notes have no value over the thesis itself as they are draft text for the thesis and copies of published articles. See Appendix 5.
10. This disposal process is in accordance with Staffordshire and Stoke on Trent Archive Service's Collections Development Policy, reviewed December 2019.
11. The policy complies with Archive Service Accreditation UK standard for archive services and supports the Archive Service's Terms and Conditions for the Deposit of Archives (last revised 2018)
12. In accordance with Staffordshire and Stoke-on-Trent Joint Archives Service's Collections Development Policy it is the practice to offer collections to other services first and it is a principle of the policy that collections will not be sold.

Legal Implications

Staffordshire and Stoke-on-Trent Joint Archives Service's Collections Development Policy is the basis for enabling the removal of items from the collection.

Resource and Value for Money Implications

Funded by Staffordshire County Council. This process will enable better care of the County Council's Archive collections through better use of storage space, staff resources and conservation material resources.

Climate Change Implications

Positive implication due to reduction in duplication and managing the size of the collections.

List of Background Documents/Appendices:

Appendix 1 - Appraisal and disposal assessment of 20 small collections of duplicates

Appendix 2 - Appraisal and disposal assessment of 8 small collections of non-Staffordshire material

Appendix 3 – Appraisal and disposal assessment of a series of national published books (Church Bells)

Appendix 4 – Appraisal and disposal assessment of duplicate Ordnance Survey sheets.

Appendix 5 – Appraisal and disposal assessment of 5 boxes of research notes and photocopies.

Contact Details

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STAFFORDSHIRE AND STOKE ON TRENT ARCHIVE SERVICE

REAPPRAISAL AND DISPOSAL RECORD SHEET

PART ONE: COLLECTION INFORMATION

Staffordshire Record Office

Small collections identified as duplicates. The majority of these collections were identified during retrospective inputting of older catalogues 2020-2021, and were not input into the online catalogue pending disposal.

Collection references and descriptions:

1045 photocopy of Gibbon family account book, copied 1969, original since purchased from the owner in 2001 (6060).

1052 photocopies of Elford parish documents, donated in 1969, original since deposited in 1976 (D3094).

1078 photocopies of plans of Crakemarsh, donated 1970, originals held at William Salt Library.

1122 photocopy of Quaker pamphlet, donated 1970, original since deposited.

1152 photocopy of plans of manoeuvres on Cannock Chase, copied 1970, originals since deposited, other copies at WSL.

1219 photocopies from printed book Tour of the Northern Counties, donated in 1971, two copies of the book already held at William Salt Library.

1221 photocopy of map from Bradford estate, taken 1971, original since deposited.

D1224 photocopies of canal maps, taken 1971, originals since deposited in 1978 (D3186)

1506 photocopy of list of shoe operatives 1942, taken in 1975, original since deposited in 1990.

D3507 photocopy of Bishop's Transcript, original already held by this Archive Service (B/V/7/1).

3685/2/1-3 County Council year books, accessioned 1981, duplicates of copies in County Council collection (C/C/Y).

3715 County Council year books, donated by SCC staff member in 1981, duplicates of copies in County Council collection (C/C/Y).

3827 photocopy of graveyard list, donated in 1982, original since deposited 1986.

3874 photocopy of deed donated in 1983, we already had the original.

4249, photocopies of documents, donated in 1985, originals since deposited in 1988.

4387 transcript of parish register, donated 1985, duplicates other copies in the Archive Service, or belongs with Piper collection at William Salt Library.

4683 photocopy of map, donated in 1987, original since deposited in 2013.

5461 photocopies of Ordnance Survey maps used by Victoria County History in 1995, originals since deposited in 1998.

6027 local history booklet on canals, donated 2001, duplicates copy at William Salt Library.

6943, photocopies of Registrar's copies of marriage registers, original parish copies then believed to be missing but since found, originals deposited 2021.

Ownership:

(indicate if owned by the Archive Service/governing body, privately owned by identified individual(s) or continuing organisation, or if current owner cannot be identified)

All of the above are owned by the County Council or were transferred from other archive offices, or owners cannot be identified.

Legal obligations and conditions of acquisition/grants:

(indicate whether under Acceptance in Lieu scheme, or subject to purchase or cataloguing grant, etc. Also check if there is a record of any previous appraisal process).

N/A

PART TWO: APPRAISAL INFORMATION

Date of appraisal: September 2023

Appraisal decisions:

B. Records to be destroyed:

Quantity: All as itemised above

Reasons: Duplicates

Permission gained from owner or permission not required.

Date of destruction:

Deaccessioned in paper accessions register and on CALM accessions database

Paper and online catalogues removed or updated

The National Archives notified

Signature of Collections Officer: Liz Street

Date: 2 November 2023

Signature of member of Joint Archives Committee:

Date:

Or see decision recorded in the minutes of the Joint Archives Committee.

File in appropriate deposit file, and Freedom of Information Legislation file

STAFFORDSHIRE AND STOKE ON TRENT ARCHIVE SERVICE

REAPPRAISAL AND DISPOSAL RECORD SHEET

PART ONE: COLLECTION INFORMATION

Staffordshire Record Office

Small collections identified as not relating to Staffordshire. The majority of these collections were identified during retrospective inputting of older catalogues 2020-2021, and were not input into the online catalogue pending disposal. Some were clearly mis-identified in terms of place.

Collection references and descriptions:

1073 notice for prosecution, Childs Ercall, donated 1970, not Staffordshire, offer to Shropshire Archives.

D1216 Waterhouses school and chapel plans, transferred 1971 by Newcastle-upon-Tyne Archives, identified as not Staffordshire, offered to Durham Archives and accepted.

1236/2 photographic copy of map, taken 1972, relates to Bishton in Shropshire not Staffs, offered to Shropshire Archives and accepted.

3064 documents relating to Abney Hall, donated 1976, not Staffs, offered to Manchester Archives and accepted.

D3175, items relating to Hawkstone in Shropshire, anonymous deposit via Gladstone Pottery Museum 1977, offered to Shropshire Archives and accepted.

3184 printed catalogue re tiling in Stoke, donated 1978 through archive in Wales, propose transfer to Stoke City Archives.

3192 photocopy of a copy deed re Shropshire 1618, donated 1978, to be offered to Shropshire Archives.

3434 school inspection re school in Dudley area, accessioned 1980, belongs with another collection already transferred to Dudley Archives several years ago.

Ownership:

(indicate if owned by the Archive Service/governing body, privately owned by identified individual(s) or continuing organisation, or if current owner cannot be identified)

All of the above are owned by the County Council or were transferred from other archive offices, or owners cannot be identified.

Legal obligations and conditions of acquisition/grants:

(indicate whether under Acceptance in Lieu scheme, or subject to purchase or cataloguing grant, etc. Also check if there is a record of any previous appraisal process).

N/a

File in appropriate deposit file, and Freedom of Information Legislation file

PART TWO: APPRAISAL INFORMATION

Date of appraisal: Sep 2023

Appraisal decisions:

A. Records to be returned transferred:

Reasons: Not Staffordshire

To whom to be transferred: Shropshire Archives, Dudley Archives, Stoke Archives, Durham Archives, Manchester Archives.

Date returned/transferred:

Deaccessioned in paper accessions register and on CALM accessions database

Paper and online catalogues removed or updated

The National Archives notified

Signature of Collections Officer: Liz Street

Date: 2 November 2023

Signature of member of Joint Archives Committee:

Date:

Or see decision recorded in the minutes of the Joint Archives Committee.

File in appropriate deposit file, and Freedom of Information Legislation file

STAFFORDSHIRE AND STOKE ON TRENT ARCHIVE SERVICE

REAPPRAISAL AND DISPOSAL RECORD SHEET

PART ONE: COLLECTION INFORMATION

Staffordshire Record Office

Collection reference: LD420 section 2/1 Copies of Church Bells periodical (later Church Bells and Illustrated News) 1870-1905 (34 volumes)

Collection title:

Lichfield and Walsall Archdeaconries Society of Change Ringers

Date of deposit: 2004 at the former Lichfield Record Office.

Ownership:

Lichfield and Walsall Archdeaconries Society of Change Ringers

Legal obligations and conditions of acquisition/grants:

(indicate whether under Acceptance in Lieu scheme, or subject to purchase or cataloguing grant, etc. Also check if there is a record of any previous appraisal process)

None

File in appropriate deposit file, and Freedom of Information Legislation file

PART TWO: APPRAISAL INFORMATION

Date of appraisal: 8 September 2023

Appraisal decisions:

A. Records to be offered back to depositor or transferred to Staffordshire County Council for locating in the new William Salt Library browsing collection (Staffordshire History Centre Project)

34 volumes of a printed national periodical Church Bells.

Reasons: These records are not covered by the collecting policy of Staffordshire Record Office and the Museum Service, the William Salt Library or Stoke on Trent City Archives, being both printed and national. Other series are held elsewhere (British Library, Bodleian, John Taylor Bellfoundry Museum), and the specific church bells content is digitised and online by the Central Council of Church Bell Ringers

<https://cccbr.org.uk/resources/library/online-publications/>

The Lichfield and Walsall Archdeaconries Society of Change Ringers has been notified of this intention and we will keep them updated as to the decision and consult as to the final destination of the volumes and possible transfer of ownership.

To whom returned/transferred:

Date returned/transferred:

Deaccessioned in paper accessions register and on CALM accessions database

Paper and online catalogues removed or updated

The National Archives notified

Signature of Collections Officer: Liz Street

Date: 2 November 2023

Signature of member of Joint Archives Committee:

Date:

Or see decision recorded in the minutes of the Joint Archives Committee.

File in appropriate deposit file, and Freedom of Information Legislation file

STAFFORDSHIRE AND STOKE ON TRENT ARCHIVE SERVICE

REAPPRAISAL AND DISPOSAL RECORD SHEET

PART ONE: COLLECTION INFORMATION

Staffordshire Record Office

Duplicate Ordnance Survey sheets. These are "blank" unannotated sheets or sheets that do not relate to Staffordshire. Most of these were identified as duplicates or not Staffordshire many years ago and were bundled together and have been stored off-site.

Some of the maps come from deposited collections but some have since been purchased by Staffordshire County Council, or no owner can now be traced.

Most OS sheets have now been digitised and are available to view for free online, particularly the mapping website of the National Library of Scotland.

Collection references and descriptions:

D593/H/8/1-116 Six rolls of OS maps identified as duplicates, mainly blank, any annotated will be retained.

D695/6/28 Thirteen duplicate sheets, any annotated will be retained.

D1058 From District Valuation Office, contains many unannotated duplicate OS sheets, mainly 3rd edition 1920s, to be disposed of (retaining those earlier sheets that are annotated relating to the 1910 Finance Act).

D1176/A/23-27 One roll of duplicate sheets.

D3371 Two rolls of duplicate OS sheets, a few are annotated and will be retained.

D3453/7/30-33 Two rolls of duplicate OS sheets, a few are annotated and will be retained.

D3729/6/17/21-34 Two rolls of duplicate OS sheets, some are annotated and will be retained. Some are badly damaged.

D3896 Four blank duplicate sheets.

D4048 Seven blank duplicate sheets.

D4432/22-36 Fifteen blank duplicate sheets.

D4489/3/8-19 Twelve duplicate sheets, mainly blank (a few boundary lines marked)

LD274 From District Valuation Office, contains a few unannotated duplicate OS sheets, mainly 3rd edition 1920s, to be disposed of (retaining the majority that are earlier annotated sheets relating to the 1910 Finance Act).

Ownership:

(indicate if owned by the Archive Service/governing body, privately owned by identified individual(s) or continuing organisation, or if current owner cannot be identified)

D593 is owned by SCC (purchased).

D695 belonged to a former solicitor's firm, these were deposited at the time of its closure so although marked as a deposit it has no identifiable owner.

D1058 are subject to the Public Records Act, it is permitted to dispose of such duplicates (informing The National Archives).

D1176 land surveyor's collection, the firm closed some years ago, we have had no response from the last known contact.

D3371 deposited by a solicitor's firm still practising. These maps to be offered back prior to disposal option.

D3453 deposited by a charity (endowed land) which has a large collection of original and copy maps. These OS maps to be offered back prior to disposal option.

D3729 belonged to a former land agent's firm in Shropshire, these were deposited at the time of its closure so although marked as a deposit it has no identifiable owner.

D3896 came from the former Midlands Electricity Board.

D4048 came from a private individual in 1983, no knowledge of whereabouts, believed to be deceased.

D4432 deposited by a Parish Council. These maps to be offered back prior to disposal option.

D4489 deposited by a Parish Council. These maps to be offered back prior to disposal option.

LD274 are subject to the Public Records Act, it is permitted to dispose of such duplicates (informing The National Archives).

Legal obligations and conditions of acquisition/grants:

(indicate whether under Acceptance in Lieu scheme, or subject to purchase or cataloguing grant, etc. Also check if there is a record of any previous appraisal process)

None

PART TWO: APPRAISAL INFORMATION

Date of appraisal: November 2023

Appraisal decisions:

A. Records to be returned to depositor or transferred:

Some to be offered back to depositors, as recorded above.

B. Records to be destroyed:

Remainder to be destroyed confidentially.

Deaccessioned in paper accessions register and on CALM accessions database

Paper and online catalogues removed or updated

The National Archives notified

Signature of Collections Officer: Liz Street

Date: 8 November 2023

Signature of member of Joint Archives Committee:

Date:

Or see decision recorded in the minutes of the Joint Archives Committee.

File in appropriate deposit file, and Freedom of Information Legislation file

STAFFORDSHIRE AND STOKE ON TRENT ARCHIVE SERVICE

REAPPRAISAL AND DISPOSAL RECORD SHEET

PART ONE: COLLECTION INFORMATION

Stoke on Trent City Archives

Collection references and descriptions:

SA/MIS – Research notes, mainly crossed out, of E Surrey Dane for his Sheffield University MA thesis “The Economic History of the Staffordshire Pottery Industry to 1850” (1950). 5 file boxes

The City Archives has a copy of the thesis, and these notes have no value over the thesis itself because they are draft text for the thesis along with old photocopies of published articles. The collection has not been processed in any way since donation and was set aside for disposal by Chris Latimer, former City Archivist.

Ownership:

(indicate if owned by the Archive Service/governing body, privately owned by identified individual(s) or continuing organisation, or if current owner cannot be identified)

Owned by Stoke on Trent City Council (donation to City Central Library local studies prior to 1997. Date of donation and name of donor unknown)

Legal obligations and conditions of acquisition/grants:

(indicate whether under Acceptance in Lieu scheme, or subject to purchase or cataloguing grant, etc. Also check if there is a record of any previous appraisal process)

N/A

PART TWO: APPRAISAL INFORMATION

Date of appraisal: November 2023

Appraisal decisions:

A. Records to be returned to depositor or transferred:

N/A

B. Records to be destroyed:

To be destroyed confidentially.

Deaccessioned in paper accessions register and on CALM accessions database

Paper and online catalogues removed or updated

The National Archives notified

Signature of Archives Services Manager: Rebecca Jackson
Date: 8 November 2023

Signature of member of Joint Archives Committee:
Date:

Or see decision recorded in the minutes of the Joint Archives Committee.

File in appropriate deposit file, and Freedom of Information Legislation file

Local Members Interest
N/A

**Staffordshire and Stoke-on-Trent Joint Archive
Committee
Tuesday 27 February 2024**

Stoke-on-Trent City Archives Move Update

Recommendation(s)

- a. That the committee note the progress update for the project.

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:

The Joint Archives Committee was updated on progress of the project at the meeting on 2nd August 2023 (Annual Report). This report brings an update on progress of the project.

Background

1. The original timescale for the move was for Stoke-on-Trent City Archives (SOTCA) open in the new location in the Potteries Museum and Art Gallery (PMAG) in May/June 2023. This would have given the Team time to survey the collections and package only.
2. It was realised that the timescale was lengthening and the decision was taken to make the move project a once in a generation opportunity to:
 - a. Appraise the Archive, Local studies Library and Ceramics Library collections.
 - b. Plan projects to deliver for the future.
 - c. Continue to deliver our core services as far as possible.

Key Areas of Work During Move Project

3. This report covers the key areas of work during this period.
4. Core services continued:
 - a. Continued the remote public service throughout and facilitated onsite visits where urgent for Stoke-on-Trent City Council

- (SOTCC) staff and others. This has been praised by The National Archives (TNA) as a best-practice model.
- b. Continued to carry out site visits to assess archives collections at immediate risk; and advised local groups about their archives.
 - c. New collections accepted and processed where there was an immediate risk of loss.
 - d. Cataloguing has not been prioritised. However, all local studies books are now on the online catalogue.
5. Benefits of continuing core services:
- a. Service users have still been able to access our service remotely using the online catalogue and the enquiry, copying and research services.
 - b. We have maintained our relationship with our customers in a really positive way despite the closure. We have had no complaints and lots of positive feedback during this period.
6. All collections surveyed, appraised and with a presence online:
- a. Surveyed the entire archive collection to ascertain packaging requirements and immediate conservation intervention needs.
 - b. Appraised and weeded the Local Studies Library book, pamphlet, map, photographic and print collections and the Ceramic Library; and prepared disposal reports for Stoke-on-Trent City Council Cabinet.
 - c. Appraised and accessioned or transferred all un-accessioned archives.
 - d. Added a collection description to the online catalogue for the 688 archive collections that are not yet catalogued. Now all 1102 Stoke-on-Trent City Archives (SOTCA) collections have a collection description online.
7. The benefits of the survey and appraisal projects:
- a. It is best practice to have all archives wrapped/boxed.
 - b. Documents are now safe to move without risk of damage.
 - c. Levels of harmful particles (from red rot and dust to mould) in the stores have been eliminated; and risk of spread of mould mitigated.
 - d. The risks posed by water ingress in the new stores has been mitigated (this is a requirement for Archive Service Accreditation).
 - e. Space has been saved.
 - f. We are now a model of best practice for archival storage.
8. Recruited and trained volunteers for the move project:
- a. A small young team has been trained and in return we have supported them in their careers.

- b. Former staff as volunteers have helped identify and list local studies collection.
 - c. The packaging project could not have been completed without this small efficient team of enthusiastic volunteers.
9. Developed our digital presence and services:
- a. Created the Stoke Archives is Moving microsite (www.stokearchivesismoving.uk).
 - b. Added new online indexes to collections to increase public access to specific sources.
 - c. All archive collections and local studies books now have an online presence. This has widened access to collections.
 - d. Continued our social media posting and development of the Minton Archive website (www.themintonarchive.org.uk).
 - e. Benefits of the digital development project are that we have kept our existing customers informed about progress in a positive way helping us to pre-empt possible complaints about restriction of services and changes to services going forward.
10. Staff development and training:
- a. We have continued to develop staff through targeted training for the move project including box making and mould identification and treatment (sessions run by the Joint Archive Service conservator); fire warden training and manual handling training for all staff.
 - b. Our 18-month part-time temporary member of staff has been successful in gaining a place on an Archive MA course.
 - c. Our archivist designed a widening access project. She has converted the Local Studies collection card catalogue into an online catalogue (15,440 individual catalogue entries).
 - d. Benefit/purpose is that staff have been trained to deliver the move project in a safe and efficient manner; staff feel valued and have remained positive about the project.
11. Planning our new reading room and archives workrooms:
- a. Workflows examined and adapted for the new building to account for the reduction in space and distance of available space from store and reading room.
 - b. Digital plans for all our work area drawn up by our digital development officer for the project team to use in allocating space at the Potteries Museum and Art Gallery (PMAG).
 - c. Furniture needs assessment carried out.
 - d. Furniture sourced from City Central Library disposals.
 - e. Approval has been given for use of the reserve to support removal costs to transfer the collections from one site to the new site. Estimated costs for this are over £26,000. In addition, approval

has also been given for use of the reserve for £10,300 to replace old and unsafe microfilm cabinets and for the purchase of frames for six photographs of each of the six towns from the Bentley Photographic Collection to be displayed within the new Reading Room area. The total amount approved for use of the reserve is c£37,000.

- f. Images from the Bentley Photographic Collection have been selected to be presented in a digital online public vote, to enable the public to choose their favourite images of each of the six towns. The chosen images will be printed, framed and displayed within the new Reading Room area.
- g. Benefit/purpose is to provide clarity to the project team about service requirements; opportunity to re-examine processes.

13. Next Steps

- a. Complete sourcing of remaining reading room furniture.
- b. Pack Local studies and Ceramic Libraries.
- c. Finalise strong room shelving layout with shelving supplier Bruynzeel and assess implications for the move.
- d. Complete physical move preparation.
- e. Move collections.
- f. Move staff furniture and equipment.
- g. Plan and deliver reopening events.

Legal Implications

The relocation of Stoke-on-Trent City Archives (SoTCA) is being managed in accordance with Staffordshire and Stoke-on-Trent Joint Archives Service's policies and Archive Service Accreditation standard.

Resource and Value for Money Implications

The project is funded by Stoke-on-Trent City Council (SOTCC). The relocation of Stoke-on-Trent City Archives (SOTCA) will enable better care and access to the City Council's Archive collections through newly converted purpose-built storage, reading room and preservation room. Procurement of goods and services for the project complies with Stoke-on-Trent City Council's (SOTCC) procurement framework.

Climate Change Implications

The Project has re-used an existing building, used energy efficient solutions within the strong rooms and reused furniture from the former City Central Library.

List of Background Documents/Appendices:

N/A

Contact Details

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Local Members Interest
N/A

**Staffordshire and Stoke-on-Trent Joint Archive
Committee
– Tuesday 27 February 2024**

**Staffordshire and Stoke-on-Trent Archive Service and
Staffordshire Archives and Heritage Service: Service
Website Procurement**

Recommendation(s)

- a. That the committee notes the progress and complexity of the procurement process for design of a new service website.

**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. Following a complex process, with input required from multiple teams, there has been significant progress and the tender is due to be made live to potential bidders in February 2024.
2. Reflection has highlighted key learning about how to approach complex procurement, including those with a digital output, which will be beneficial in the future.

Background

3. Provision is made as part of the National Lottery Heritage Fund (NLHF) funding for Staffordshire History Centre project to tender for a company to design and launch a new website for the service. This forms part of the agreed plan of activities that accompany the funding.
4. The NLHF procurement guidance meant that the website development must go out to tender and could not be completed internally by the Staffordshire County Council (SCC) digital team. The brief also requires a specialist supplier that can integrate the collections catalogue into the website.
5. The new website will replace existing pages hosted on the Staffordshire County Council website whilst incorporating the online catalogue which

is currently hosted by SCC as Gateway to the Past. The website will acknowledge the funding partners for the Joint Archive Service and Heritage Service.

6. The development of a new external website will improve access for residents and service users and allow the service to better promote and highlight our offer and communicate with audiences. There will be the opportunity to streamline processes, and harness digital operations through increased functionality and specialist features not available via the existing SCC webpages.
7. The new website will contribute to a revitalised and vastly improved digital offer in the following ways:
 - a. A stable, integrated catalogue with advanced search options which will be a great improvement to the visitor experience for researchers.
 - b. Signposting to multiple digital resources in one place will be more user friendly and researchers will be able to conveniently browse the breadth of our resources.
 - c. Clear visitor information and promotion of events will allow residents to easily access services and plan their visit to our sites.
8. The need for a new external website was based on extensive user consultation during the development phase of the History Centre project. Further information can be found in the briefs and activity plan documents.
9. Staff turnover in the Archives and Heritage Service, lack of specialist ICT resources in the procurement team and a delay to progressing some aspects of the activity plan whilst seeking a grant uplift, contributed to delays to the procurement process for the website. In addition, the development of specialist documentation proved to be complex and required feedback, input, and review from multiple teams with specialist knowledge.
10. Bespoke terms and conditions were required, and the documentation has been re-drafted several times following legal review.
11. To mitigate delays around communication with audiences both parts of the service created project microsites. Positive feedback about the microsite has been received from staff, audiences, and sector leads.
12. Reflecting on this procurement, lessons have been learnt and will be fed into the project evaluation. These include:

- a. Regular meetings have been established to create channels of communication; one with the ICT project manager for the SHC and on all aspects of digital engagement with key service staff.
 - b. One staff member has coordinated all the feedback from multiple teams and acted as a single point of contact with the legal team.
 - c. Support has been given by managers in the procurement team. In future any delays will be escalated to them as early as possible.
13. The proposed web address for the new service website has been discussed and researched by the Archives and Heritage Management Team (which the City Archives Manager attends) with input from ICT colleagues. The proposed address of www.staffsstokehistory.gov.uk has been approved by the Chair and Vice Chair of the Joint Archives Committee. This has been selected as the most appropriate address for the following reasons:
- a. It is inclusive of all areas of the joint service and has an obvious link to the service's role.
 - b. For continuity it is the same name as one of the existing social media channels used by the service.
 - c. The use of the gov.uk domain suffix gives greater control over the ownership of the site address long term and increases visitor trust.
 - d. Agreeing a web address in advance of the procurement documents being made live has been recommended as best practice by the solicitor reviewing the terms and conditions for this procurement.
14. Documentation is currently under final review from the legal team with input from procurement ICT specialist staff. The tender will be made live as soon as possible and shared with multiple specialist suppliers to encourage bids. A phased project plan has been developed to allow the successful bidder to launch the first part of the site as early as possible.
15. Other archive services are being consulted on their experience of procuring similar specialist website services by learning from their experiences we can be as efficient as possible during the start-up process with the successful bidder.

Legal Implications

The tender documentation has been reviewed by SCC legal staff and bespoke terms and conditions have been created.

Equalities implications

This report has been prepared in accordance with the personnel and equal opportunities' policies of the County Council and the City Council. The tender process requires bidders to agree to accessibility guidelines as specified by NLHF.

Resource and Value for Money Implications

Funding is in place from the National Lottery Heritage Fund. Using both NLHF guidance and Staffordshire County Council procurement processes ensures good value for money.

Risk implications

Risk register for the service has been completed.

Climate Change Implications

Sustainability issues will be interrogated as part of the procurement evaluation using the tender quality questions.

List of Background Documents/Appendices:

Briefs for Staffordshire History Centre procurement
Staffordshire History Centre Activity Plan

Contact Details

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

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Local Members Interest
N/A

**Staffordshire and Stoke-on-Trent Joint Archive
Committee
– Tuesday 27 February 2024**

Predicted performance outturn 2023/2024 and benchmarking with comparator archive services

Recommendation(s)

That the Committee note:

- a. Notes the predicted performance outturn for Staffordshire and Stoke-on-Trent Archive Service and Staffordshire’s Archives and Heritage Service.
- b. Notes the key findings from the benchmarking exercise against comparator archive services.

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. More detailed information on progress against the delivery plan is given in Appendix 1 to the report.
2. At the Joint Archives Committee meeting held on 2 August 2023 the Committee requested that a report including benchmarking against comparator services was brought for consideration. The results of the benchmarking exercise are summarised below with more detailed information available in Appendix 2 to the report.

Predicted performance outturn 2023/2024

3. The Service Delivery plan covers the work of the Joint Archive Service and Staffordshire County Council’s Archive and Heritage Service. It is

developed by the Archive and Heritage Management team which includes the City Archives Manager. The service plan is monitored quarterly, and the predicted performance outturn is based on the period up to December 2023.

4. **Service demand one** covers work to develop and embed partnerships and the volunteer programme. All areas are RAG (Red/Amber/Green) rated as green and key achievements include the establishment of the development trust for the History Centre; ongoing partnerships with the Universities of Keele and Nottingham; growing the History Centre Network; supporting our Friends groups; supporting the New Victoria Theatre and the Chatterley Whitfield group; and developing our procedures for volunteers and work experience placements. We are predicting a small increase in volunteer hours by the end of the financial year. Customer satisfaction has dipped slightly but remains high.
5. **Service demand two** focuses on the buildings and environment for our collections and meeting our archive and museum sector accreditation standards. Most areas are RAG rated green with exceptions in policy reviews and the conservation programme where some areas are rated as amber. These are due to lack of capacity during a period where both the Staffordshire and Stoke parts of the service are focussed on redevelopment of their physical services. Key achievements are continued review of collections and identification of items for disposal; preparation work for the move of the Stoke-on-Trent City Archives collection; delivery of the Rugeley Power Station project; and the staff training programme. We are predicting that 99.5% collections will have at least an online collection description, the number of documents issued is approximately 1,000 lower due to temporary access restrictions in place. The budget is predicted to breakeven and accreditation status remains in place. The objects on loan figure is calculated at the end of the financial year.
6. **Service demand three** focuses on engagement with stakeholders and diversifying users of the service. All but two areas are RAG rated green with the website and marketing plan procurement as areas which have been delayed. Key achievements in this section include successful delivery of and participation in events; development of the school sessions and family activities; delivery of the exhibition programme; and development of interpretation for the History Centre. The number of events delivered has increased by 62%, attendances at events has already doubled compared to the previous year, and there have been seven more exhibition appearances.
7. **Service demand four** covers the work the service does to share knowledge across the sector and support other organisations. All but one

area is RAG rated green with procurement work on the commercial online offer stalled due to capacity issues. Key achievements include the ongoing participation in regional networks; contribution of case studies and presentations at conferences; and continued advice and support to organisations who hold collections. It is predicted that advice levels will be similar to the outturn for the previous year.

8. **Service demand five** covers online engagement and services. Most areas are RAG rated green but the procurement of the new website and progress on digital preservation are rated amber. There is a separate report on the website and delays are due to this being a more complete process than envisaged. Digital preservation has stalled due to lack of capacity to implement new systems and processes. Key achievements include delivery of more online name indexes; exceeding the target to add more images to Past Track; progressing the digitisation plan; and increased visits and engagement with online content. The number of website visitor sessions has already increased by 16% compared to the previous year and social media use is up by 24% compared to 2022/2023.
9. Most targets will be delivered by the end of the financial year with notable improvements compared to the previous year. There are some areas which have not progressed in part due to capacity issues whilst both parts of the service prepare for moves into new or extended sites.

Benchmarking exercise

10. The National Archives completed a Local Authority Benchmarking Exercise in 2023 which replaced the Archive Services Statistics Survey previously run by the Chartered Institute of Public Finance and Accountancy (CIPFA). 58% of 126 English and Welsh local authority archive services participated in the survey which gathered data from 2021/2022 on use of archive services. Many services were still recovering from COVID-19 so figures were sometimes lower than anticipated or not reported in the survey.
11. There is no direct comparator for Staffordshire and Stoke-on-Trent Archive Service which comprises a county and city service jointly funded and managed by two authorities. There is also no comparator which delivers an archive, local studies, and museum service. The selected comparators included near neighbours (Warwickshire, Worcestershire, Derbyshire, and Cheshire) and a service which has also delivered a major National Lottery Heritage Fund project (Suffolk).
12. The following areas were selected for comparison:
 - a. Staffing: numbers at headquarters and branches if applicable.

- b. Volunteer numbers and hours
- c. Archive holdings
- d. Born digital holdings (digital archives)
- e. Percentage of collections without any finding aid (a catalogue)
- f. Digital preservation system
- g. Enquiries received
- h. Website visitors
- i. Social media Facebook likes, Twitter followers

Finance was not selected as the size and make-up of the services are very different and some services did not answer these questions. The number of visitors to search rooms was also excluded as it was clear that this was still in recovery from temporary closures.

13. Staffing and volunteers used within the service varied. Staffing levels at the county service were the lowest and the city service was comparable with Suffolk for branch staffing levels. The service had the highest number of volunteer hours.
14. The size of archive collections held was average but the number of born digital holdings was the lowest indicating a need to increase collecting in this area. The service performed well with almost all collections having a collection level description online.
15. The service received the highest number of enquiries. Attendances at events were very varied again indicating recovery after COVID-19. For website visitors the service was third highest, second for Facebook likes and third for X/Twitter followers. Note not all services answered the social media questions.

Next steps

16. The predicted performance outturn and the benchmarking exercise both indicate that overall, the service is performing well and delivering on most of its objectives. However, there is evidence that the service needs to prioritise work on digital preservation and identify a way of increasing capacity to achieve this. This priority has been included in the service delivery plan for 2024 and a review of the Digital Preservation Policy will be undertaken.

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 is forecast to break even for 2023/2024 with any underspend transferred to the Joint Archives reserve.

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 Archives and Heritage Service Delivery Plan 2023 predicted outturn.

Appendix 2 Benchmarking exercise with comparator services

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Appendix 1 Archive and Heritage Service Delivery Plan 2023/2024

Service Demand 1: The Archives and Heritage Service is developed by an Active Partnership between Councils, users, depositors, partners, volunteers in all areas of the service including: funding, management and delivery.

By 2025:

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

Lead Officer: JT, LF

Key service delivery themes	Work streams	RAG rating	Performance update
Existing Partnerships	Launch and promote Development Trust with: William Salt Library Trust, Keele University, Friends, Depositors	Green	Development trust met in November and has appointed all trustees. Identified a plan for fundraising. Crowdfunding and a talkathon proposed.
	University partnerships: Keele University – collaborative PhDs, VCH, Paupers	Green	Successful term one of adult learning course. VCH ongoing. Hannah Smith leading her volunteer group looking at slavery in Staffordshire. Another collaborative PhD lined up with David Ballantyne on anti-racism movement in N Staffs in 1970s. Pauper group has completed, might be a pop-up exhibition.
	Nottingham University – Place Names and support creation of AHRC funded application in 2023/2024	Green	Notts group is back with new web resources. Good working relationship and still support them if they get their AHRC funding.
	Work with Library and Arts Service & St Mary's to fully reopen the HAP, re-establish the service and support volunteering	Green	HAP has a pool of volunteers settled in their role. Two of them came to Christmas party and spoke positively on it. Being used more. Christmas card session popular, brought new

	Support Friends committees with their social and fundraising events	Green	<p>people in. We continue to work with partners over access to the HAP.</p> <p>Head of Service and Collections Manager attended AGMs. Friends of Staffordshire & Stoke-on-Trent Archive Service to transfer the funds held on behalf of the service. Chair of WSL met and Head of Service attend Friends of William Salt Library to update them on work to redevelop the library.</p>
Page 64	Embed Staffordshire History Network and newsletter	Green	Network over very well established. We have 106 organisations represented in the membership list with over 40 actively engaged. Newsletter readership is 530. Planning ahead for 6 months to cover whole of the historic county. Got useful infographics.
	Support New Victoria Theatre Archive committee	Green	LF attends annual meeting usually in April. Now in person at the New Vic.
	Working with Historic England support Chatterley Whitfield group to secure the archives in the appropriate repository or community archive.	Green	They have joined the SHN network. Lisa attended a meeting and Helen has also provided assistance. Historic England are involved and our meetings are with them.
C Volunteer programme	Review policies, recruitment and processes for young volunteers.	Green	Trialled work experience placements with young volunteers. We are looking at safeguarding procedures for all volunteers within SCC.
	Continue recruitment to roles that support SHC	Green	Paused after Volunteer Coordinator resignation. Only role recruiting to HAP and Staffs and Slavery Group at moment.
	Develop volunteering on site at Stoke	Green	Already have volunteers for move, plan to develop alongside reopening plans. Stoke reviewing how to take forward safeguarding within City Council.

Performance Measures	<p>Number of volunteer hours given to the Service: April to December 2,840. Predicted outturn 3,700 which is 100 hours more than 2022-2023.</p> <p>Customer satisfaction rating – 97.7% good and very good on distance use survey. Previous year was 99%.</p>		

Service Demand 2: Archives and Heritage Service has been re-shaped and redesigned to encourage resilience, new ways of working and refocusing its delivery to the needs of users.

By 2025:

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

Lead Officer: CC, JON, LF

Key service delivery themes	Key workstreams	RAG rating	Performance update
A. Financially secure, new team members welcomed, whole team supported through change	Develop organisational change with teams at Staffordshire & Stoke for improved service offer	Green	Workshop style staff meetings in place to plan for move. Stoke planning going well in archive team on weekly basis. Develop relationship with Strategic Manager when appointed. Still on course for balanced budget in County Service, with slight underspend. Stoke has spending freeze.
	Deliver balanced budget, fully utilised to develop the service offer	Green	
	Develop matched funding applications for SHC	Green	Artist Tony Stallard responded and wants to work with us on ACE light art bid. Museum Development fund bid for volunteer equipment £1,770 – received this and just completing spend. Funds from Marches Network
	<ul style="list-style-type: none"> • ACE projects bid for light artist (not NLHF match funding) • Explore other funding opportunities 	Green	

	<ul style="list-style-type: none"> Public appeal 	Green	<p>are being dispersed and for our reserve will be £10.4k. Bid to TWA digitisation for £3k was unsuccessful but still taken project forward within own resources.</p> <p>Development trust has met and planning appeal. Bid to TNA engagement fund re Sense of Place project has been submitted.</p>	
Page 66	B. Service accreditations met	Implement and monitor actions from archive accreditation report	Green	In progress.
		Submit museum accreditation return	Green	Completed. Will need to do full return next year.
		Review policies at JAC and WSLT:		Stoke policy completed. Reviewing need for Staffs Policy.
		<ul style="list-style-type: none"> Local Studies Policy – SCC & Stoke (2 pols) Access Policy Appraisal and Disposal Policy & Collections Information Policy 	Amber Amber Green	Collection Manager leading this now as required for Museum Accreditation. Completed
		<ul style="list-style-type: none"> Collections Development, Conservation, Documentation policies – Museums Digital Preservation Fundraising Strategy Marketing Strategy 	Green Amber Amber Amber	Completed & approved Delayed to lack of capacity and skills. In progress but delayed. In progress but delayed.
		Deliver compliant storage environment <ul style="list-style-type: none"> SHC Stoke/PMAG move Liaise with TNA 	Green	All plans are agreed and in progress. Continue to liaise to Mike Rogers from TNA.
C. Collections management	Review annual archive conservation and preservation programmes	Amber	Conservation programme has been impacted by moves in both parts of the service. Planning to restart post moves.	
	Update and test Emergency Plans	Green	Revised emergency plan is completed and issued to staff. Has been tested by various site issues across whole service. Emergency team were briefed on changes.	

	<p>Deliver Museum Conservation Plan and Documentation Plan</p> <p>Conservation clean WSL collection and return to SHC</p>	<p>Green</p> <p>Amber</p>	<p>Ongoing but less remedial conservation this year. Review both next year.</p> <p>WSL collection stored at 56 Eastgate St however has been impacted by other priorities.</p>
<p>D. Collections development</p> <p>Page 67</p>	<p>Disposals from museum & archive collections</p> <p>Identify collections suitable for back-cataloguing by volunteers or for project work</p> <p>Deliver annual Collections Development work (See Collections Team plan for details)</p> <p>Deliver Rugeley Power Station project</p> <p>Deliver Pandemic War Diary oral history and digital collecting</p> <p>Liaise with COVID Public Inquiry SCC team</p> <p>Prepare Archive, Local Studies Library and Ceramics Library collections ready for the move of Stoke-on-Trent City Archives from its current location to its new location</p>	<p>Green</p> <p>Green</p> <p>Green</p> <p>Green</p> <p>Green</p> <p>Green</p> <p>Green</p>	<p>Completed May 2023</p> <p>Ongoing</p> <p>Work ongoing.</p> <p>Exhibition and website delivered. Pop up exhibition touring until February 2024.</p> <p>29 interviews completed & 24 transcripts to end Dec 2023. Five detailed synopses. Can request funds for the book but need to take update on the project.</p> <p>Ongoing</p> <p>Collections almost ready to move. Waiting until building final completion.</p>
<p>E. Manage our buildings to ensure they are safe, more cost-effective</p>	<p>Monitor arrangements for living with COVID and ensure buildings are compliant</p> <p>Revise health and safety risk assessments for existing buildings and for temporary base</p>	<p>Green</p> <p>Green</p>	<p>Covid regulations now part of H&S risk assessments. Managing impact on small with WFH if applicable.</p> <p>All revised and had fire marshall training.</p>

and sustainable	Maintain our buildings and monitor annual servicing arrangements with Property Services	Green	Stoke risk assessments updated and includes lone working. Ongoing
F. Training and development of staff and volunteers	Implement year two training programme for staff and volunteers from Activity Plan Deliver We Talk annual review conversations and identify training and development needs	Green Green	Training ongoing for staff and volunteers not necessarily in the order of the plan. All completed.
Performance Measures	Percentage of collections with at least a collection-level description online (annual figure) 79.45% of all collections are fully listed online and 99.5% of all collections have at least a collection description. (to end March 2023) Number of documents issued 1,456 up to Dec 2023. Predicted outturn 1,900 which is 1,000 lower than previous year. Number of objects loaned (annual figure) Balanced budget (JT) Budget forecast to balance with underspend to JAC reserve. Accreditation status (JT/CC) Approved accreditation		

Service Demand 3: Archives and Heritage Service has diversified its users, stakeholders and collections. This has resulted in increased visibility and understanding of the service by the public and increased levels of new users. People are proud of the Staffordshire History Centre

By 2025:

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

Lead Officer: SE,CC

Service Delivery Activities	Key Milestones	RAG rating	Performance update
A. Deliver a rejuvenated public service enabling people to engage with the collections across a range of subjects and disciplines	Deliver Staffordshire History Day Support Staffordshire History Festival Sep-Oct and evaluate engagement <ul style="list-style-type: none"> • Heritage Open Day • Adult learning • Pop up programme 	Green Green	Delivered online and evaluated. Extra study day in November delivered. Supplied programme and participated in events, and evaluation. Launched walking tours.
B. Engage new audiences with the Service	Deliver SHC Activity Plan <ul style="list-style-type: none"> • Develop formal learning offer • Establish co-production projects • Expand volunteering opportunities • Develop events & activities targeted at specific audiences including families • Deliver a ThanksToYou offer for lottery players / celebrate the project online 	Green	Three school sessions in development includes Beneath our feet. Ongoing co-production and consultation with various groups for the SHC co-curation & school offer. Volunteer recruitment paused until new co-Ordinator in post, group outputs reviewed, and a new group planned. HAP volunteers recruited. Seasonal family offer developed and delivery is ongoing at libraries. Annual thanks to you offer delivered. Regular blog posts celebrate the project.
C. Marketing and promotion	Deliver Digital Engagement Plan and assess new channels Create & deliver SHC Marketing Plan	Amber Amber	Got microsite for both services. Website procurement almost ready to go. Steer came to leave new channels to SCC to look out. Procurement of marketing consultant due.

<p>D. Online and physical exhibitions</p>	<ul style="list-style-type: none"> • CLandage pop up exhibition • Rugeley Power Station large and Pop Ups • Beneath our feet • Food – title to be confirmed 	<p>Green</p> <p>Green</p> <p>Green</p> <p>Green</p>	<p>Touring extended to mid-2024.</p> <p>Large exhibition completed, pop up touring until 2 Feb.</p> <p>Launched 27 Jan and exhibition tour arranged.</p> <p>Under development – ‘Know your Onions ’ more interactive for young people. One after is seaside holidays.</p>
<p>E. Access to William Salt Library collections</p>	<p>Trial access to WSL pamphlets</p> <p>Plan for implementing location codes particularly on CALM</p>	<p>Green</p> <p>Green</p>	<p>Trial complete and access in place.</p> <p>Draft plan complete and being progressed.</p>
<p>F. Learning</p>	<p>Deliver Learning Plan as set out in the Activity Plan:</p> <ul style="list-style-type: none"> • Develop a formal learning offer for KS1 to 5 using a co-production ethos • Establish partnership working with local heritage education venues • Develop a creative work experience placement offer • Establish a local teacher network <p>Support University and school students on professional placements (focus on over 18s)</p> <ul style="list-style-type: none"> - 2 at Stoke - 2 at Staffordshire 	<p>Green</p> <p>Green</p>	<p>Three sessions in development – ongoing co-production into the new school year with the same cohorts. Content was tested in the summer family programme. Use half terms to test more content.</p> <p>Two Assemblies created and used to test content.</p> <p>Strong partnership working established with college/schools, heritage venues and support given from subject advisors. Working on Abbots Bromley project.</p> <p>Feedback gathered from trial work experience placements.</p> <p>Network established with a MS teams channel but limited engagement in summer term – rethinking communication techniques. Possibly newsletter instead. 58 members.</p> <p>On pause at Stoke</p>

	Create and trial the adult learning offer with Keele University	Green	3 under 18s placements done and 2 over 18s done plus 2 planned. Enquiries for 2025 being taken. Term 1 complete and evaluated and got Term 2 ready to go.
G. Access and equalities	Complete access consultation	Green	Recruited to access forum which is virtual and linked to their expertise.
	Deliver SHC Access Strategy	Green	Agreed this is physical and intellectual access to History Centre including quiet times, audio, visual enhancements, social stories etc.
H. Engagement with cross-disciplinary exhibitions	Deliver SHC Interpretation Plan	Green	Agreed the fabrication of exhibition units. Finalising content for curated wall display. Working on digital labels, welcome screen, agreed colour schemes based on We Are Staffordshire.
	Support loans at Shugborough Hall with National Trust	Green	Ongoing
	Deliver loans programme in consultation with partners and stakeholders	Green	Ongoing
Performance Measures	Number of talks and events delivered by Service 88 up to Dec 2023, which is already a 62% increase on previous year. Number of attendees at all events and talks delivered 3735 up to Dec 2023, which is already double the previous year. Number of exhibition appearances 17 up to Dec 2023, which is 7 more than previous year.		

Service Demand 4: The Archives and Heritage Service shares knowledge on new ways of working with other services

By 2025:

- The service acts as a national focus for sector knowledge in active partnerships, including volunteering. This has

involved partnerships with the National Archives, Arts Council England and the Archives and Records Association.

- The service supports other museums and organisations which hold objects and archives in their collections to ensure they are secure, accessible and sustainable.

Lead Officer: JT, SE

Service Delivery Activities	Key Milestones	RAG rating	Performance update
A. Sharing knowledge with the wider archive and museum sector Page 72	Participate in Archives West Midlands	Green	Continue to attend trustee meetings and working on projects. JT stands down 2024, to consider another team member from the service.
	Contribution of papers to sector conferences and training seminars	Green	Engagement team presented at Museum Devt conference. Did a blog for ARA learning going out online on coproduction.
	Develop case studies to share at sector events and respond to calls for evidence	Green	Volunteering case study shared by Archives West Midlands June 2023. SHN was in A year in Archives by TNA.
	Participate in Marches Network and work with regional MDO programme	Green	Ongoing and network signposts to it.
	Deliver SHC Evaluation <ul style="list-style-type: none"> • Appoint consultant • Evaluate year one 	Green	Consultant (The Audience Agency) appointed First report produced.
B. Developing a close relationship with voluntary sector organisations	Facilitate German War Cemetery exhibition moves	Green	Completed
	Advise on collections/fundraising for German war cemetery	Green	No advice requested.
	Set up stakeholder group to shape design and programming for SHC	Green	Critical friends group established.

C. Reviewing and developing its income generation programme.	Annual review of income, fees and charges	Green	Completed awaiting JAC approval.
	Review existing commercial online offer	Amber	Had one meeting with procurement, stalled due to capacity issues.
	Deliver SHC project Business plan	Green	Met with business enterprise team re WSL office space.
	<ul style="list-style-type: none"> Develop SHC charging policy Develop Learning offer pricing policy Work with WSL on office space rental 	Green Green Green	Learning still to be priced once complete. Operation of WSL office space discussions ongoing.
D. Supporting and advising heritage groups across the county on their development	Maintain Staffordshire History Network	Green	Ongoing and delivering fifth meeting.
	Museum mentor for two museums to maintain accreditation and support GEM mentoring programme	Green	Mentors for Chasewater Railway (CC) and Claymills (HJ)
	Support and advise groups on caring for their collections	Green	Ongoing
	Advise NBHT and partners on development of heritage centre in Burton	Green	Ongoing Also advising Chatterley Whitfield and North Staffs Railway Museum (part of Churnet Valley).
Performance Measures	Number of organisations actively engaged with in an advisory capacity: 61 instances of support given to 37 different organisations compared to 66 for previous year complete.		

Service Demand 5: Archives and Heritage Service has increased its activity online and is delivering more services online.

By 2025:

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

Lead Officer: SE, CC

Service Delivery Activities	Key Milestones	RAG rating	Performance update
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A. Develop new online platform	Commission new website - Appoint contractor - Launch website	Amber	Draft procurement template and T&Cs almost complete but has been delayed by complexity. Domain name agreed. SHC and Stoke microsites work well.
B. Deliver new online content	Staffs Name Indexes – add new/extended indexes	Green	Diocese of Lichfield Wills index extended. Two more added Stoke City Police 1910-1941 and Special Constables 1916-1926.
	Staffordshire Pastrack – add 750 new images	Green	1,100 images added to end Dec 2023.
C. Align onsite and digital services	Review online service during closure	Green	Ongoing discussion through AHMT. Reviewed access at Staffs site and Stoke. Microsites in place.
D. Provide access to born digital archives.	Internal training on current digital archives provision	Amber	Unable to progress re lack of capacity due to SHC project. Unable to install DROID software as blocked by ICT due to security concerns.
	Progress regional work with Archives West Midlands	Amber	
	Implement Digital Preservation software	Amber	
E. Digitisation programme	Implement programme identified in Activity Plan <ul style="list-style-type: none"> • McCann photos • Evode & Re-solv collection • Town maps • Aerial photos 	Green	McCann digitisation underway (317 to end Dec). Re:solv collection box listing complete and working on cataloguing. Icam digitising 1945 aerial photographs.
F. Social media	Review use of social media accounts in light of audience research	Green	Reviewed and done.
	Review new branding to social media	Green	Branding has been updated. Digital group meet quarterly to review.
Performance Measures	Visits to Service websites (all online offer) 353,864 to end Dec 2023 which is already a 16% increase on previous year. Social media impressions/reach/likes/views 226,175 to end Dec 2023 which is already 24% increase on previous year.		

Benchmarking exercise using The National Archives 2023 survey of local authority archive services

Data source

The data source for this benchmarking exercise are the results of the [Local Authority Benchmarking Exercise](#) completed by The National Archives in 2023. This replaces the annual Archive Services Statistics Survey run by the Chartered Institute of Public Finance and Accountancy (CIPFA). The benchmarking exercise was opened to all 126 English and Welsh local authority archives and closed on 28 February 2023. The survey was completed using data from the year 2021/2022. 58% of services participated in the benchmarking exercise.

Selected services

Staffordshire and Stoke-on-Trent Archive Service is unique in England being the only jointly funded and managed local authority service which comprises a city and a county service. Both the county and city services include local studies collections, as do some archive services such as Derbyshire. Staffordshire also provides a museum service and whilst this is not unique the service does not separate its staff roles out for this service. Some archive services also deliver records management functions, which the joint archive service does not.

In selecting comparator services three neighbouring services from the Midlands have been included (Derbyshire, Warwickshire and Worcestershire) who are all funded by one authority and operate one service point. Cheshire Archives and Local Studies is included as it is funded by two local authorities and is a near neighbour. Suffolk Archives is included as it currently operates three service points and has delivered a NLHF funded project to create a new archives centre called The Hold.

Data relates to 2021-2022 in which many archive services were still operating reduced access in line with COVID-19 restrictions.

Selected categories

- Staffing: nos at headquarters, branches if applicable and total.
- Volunteer hours
- Archive holdings
- Born digital holdings
- Percentage of collections without any finding aid
- Digital preservation system
- Enquiries received
- Website visitors
- Social media Facebook likes, Twitter followers

Staff and volunteers

Office	Staff at headquarters (fte)	Staff at branches (fte)	Volunteers	Volunteer hours
Staffordshire & Stoke-on-Trent	11.2	5	91	3607
Cheshire	14.9	0	130	2250
Derbyshire	15.7	0	1	208
Suffolk	12.7	6	59	2657
Warwickshire	12.2	0	169	3492
Worcestershire	12	0	6	76

The service headquarters (Staffordshire service) has the least number of staff by full time equivalent. Only Suffolk operates branch offices (two) and has 6 staff compared to 5 at Stoke. The service has the 3rd highest number of volunteers and highest number of volunteer hours.

Collections

Office	Archival holdings cubic metres	Born digital gigabytes	% collections uncatalogued	Digital preservation system
Staffordshire & Stoke-on-Trent	1077.1	0.5	0.01%	Preservica
Cheshire	612	105	0%	None
Derbyshire	940.34	114.8	Not answered	None
Suffolk	1339.57	705	38.61%	Preservica
Warwickshire	628	84	0%	Several open source
Worcestershire	1166.7	812.43	28%	None

The service has the third largest analogue collection but the smallest digital archive. It is one of three services to have a digital preservation system, but the small size of the collection reflects the lack resource to implement the system and proactively acquire digital collections. The service performs well in having almost none of its collections lacking a finding aid of some sort.

Access

Office	Enquiries received	Event attendees	Website visitors	FB likes	X/Twitter followers
Staffordshire & Stoke-on-Trent	5124	330	70,579	3010	3001
Cheshire	4744	317	91,335	NA	3654
Derbyshire	NA	2	2,157	NA	868
Suffolk	5007	6667	597,449	2324	3543
Warwickshire	2812	0	12,751	NA	NA
Worcestershire	1722	0	58,566	3591	3694

Staffordshire and Stoke-on-Trent received the most enquiries compared to other comparator services. Event attendees shows wide variation reflecting differing stages of recovery from Covid-19. Suffolk had attended several external events as part of their NLHF activity programme with the resulting very high number of attendees. Similarly, Suffolk has by far the highest number of website visitors with Staffordshire and Stoke the third highest service. Social media was not recorded by all services. The service was second for Facebook likes and third for Twitter/X followers.

