

**Staffordshire and Stoke-on-Trent Joint Archives Committee**

Thursday, 20 November 2014

**10.30 am**

County Record Office, Eastgate Street, Stafford

John Tradewell  
Interim Chief Executive  
12 November 2014

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**A G E N D A**

1. **Apologies**
2. **Declarations of Interest in accordance with Standing Order 16**
3. **Minutes of the meeting held on 19 June 2014** (Pages 1 - 4)
4. **Predicted Outturn 2014/15** (Pages 5 - 12)

Joint report of the Director of Finance and Resources and the Assistant Director – Finance Services

5. **Review of Fees and Charges 2015-2016** (Pages 13 - 24)

Joint report of the Director for Place and Deputy Chief Executive and the Assistant Chief Executive

6. **Digital Engagement Strategy** (Pages 25 - 36)

Joint report of the Director for Place and Deputy Chief Executive and the Assistant Chief Executive

7. **Heritage Lottery Fund bid for Staffordshire History Centre** (Pages 37 - 46)

Joint report of the Director for Place and Deputy Chief Executive and the Assistant Chief Executive

8. **Date of next meeting - 19 February 2015 in Stoke-on-Trent (venue to be confirmed)**
9. **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”.

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**PART TWO**

(All reports in this section are exempt items)

**10. Update on Digitisation of key family history collection (Pages 47 - 50)**

(exemption paragraph 3)

Joint report of the Director for Place and Deputy Chief Executive and the Assistant Chief Executive

**Membership**

Ben Adams  
Olwen Hamer  
Ian Parry  
Mike Davies (Observer)

**Substitutes**  
Mike Lawrence  
Mark Winnington  
Adrian Knapper

### **Minutes of the Staffordshire and Stoke-on-Trent Joint Archives Committee meeting held on 19 June 2014**

Present: Mike Lawrence, Michael Greatorex (Observer) and Joy Garner

Apologies for absence: Ian Parry

#### **PART ONE**

##### **1. Appointment of Chairman and Vice-Chairman**

The Committee noted changes to the City Council's membership of the Joint Archive Committee following changes to its Cabinet and welcomed Joy Garner to the meeting. They noted the change of substitute member to Adrian Knapper (in place of Andy Platt) to represent the City Council in the event that Ms Garner was unavailable, but would only assume voting rights in her absence.

(a) **RESOLVED** - That Joy Garner be appointed Chairman of the Staffordshire and Stoke-on-Trent Joint Archives Committee up to the annual meeting of the Joint Committee in 2015.

##### **Joy Garner took the Chair**

(b) **RESOLVED** – That Mike Lawrence be appointed Vice-Chairman of the Staffordshire and Stoke-on-Trent Joint Archives Committee up to the annual meeting of the Joint Committee in 2015.

##### **2. Declarations of Interest in accordance with Standing Order 16**

None at this meeting.

##### **3. Minutes of the meeting held on 20 February 2014**

**RESOLVED** – that the minutes of the meeting held on 20 February 2014 be agreed and signed by the Chairman.

##### **4. Staffordshire and Stoke-on-Trent Archive Services: Annual Report 2013/14**

The Committee considered the Annual Report for 2013/14 providing an account and review of the work and performance of the Staffordshire and Stoke-on-Trent Archive Service for the financial year from April 2013 to March 2014.

The Committee were aware that the terms of the Joint Agreement for Archive Services between Staffordshire County Council and Stoke-on-Trent City Council required an annual report of the Joint Archive Service to be brought to the Annual Meeting in June, to give them a full overview of the range of activities, progress and performance of the Service.

The year 2013/14 was the second in the current three-year planning cycle for the Joint Archive Service. This year's Annual Report shows both positive achievements and steady progress towards meeting the overall strategic objectives of the Archive Service within the current Forward Plan, 2012-2015.

The annual report detailed the most notable successes which included: (i) the delivery of two grant funded projects to catalogue the Bradford Archive and to digitise the Staffordshire Manorial Documents Register; (ii) the Stoke Archives had made significant progress cataloguing the Spode Archive; and (iii) building on the successful start of the Great War Centennial Commemorations the Service had continued to work with many local groups and organisations to build a programme of events, which had been taken further with another project bid submitted to the Heritage Lottery Fund to digitise and index the rare Military Tribunal records (started with Arts Council funding). The Committee acknowledged that these projects relied on volunteer support to make them happen and widen access to the collections.

The Archive Service had also embarked on an ambitious project to extend Staffordshire Record Office to enable the co-location of the William Salt Library and Lichfield Record Office collections on one site. This would allow the partnership to provide modern storage and search rooms with additional facilities such as a user break out space to relax and consume refreshments and an exhibition space to show off the fine collections that the Service holds. The Service had also just started its digitisation project with D C Thomson (Find My Past) which would bring online access to the county and city's parish registers.

The Committee noted the public service statistics detailed in the report, and that they had achieved a 99% customer satisfaction rating in the national Public Services Quality Group User Survey. They also noted that the use of the service continues to change and plans were being developed to adapt to new demands starting with the digitisation programme of popular sources. Overall it was a successful year for the Service and they continue to meet high standards whilst also developing plans to adapt to changing demands. The Chairman asked that the thanks of the Committee be passed to the volunteers; Friends of the Archive Services; and staff for their hard work and dedication to the service.

**RESOLVED** - That the annual report on the work of the Staffordshire and Stoke-on-Trent (Joint) Archive Service for the period April 2013 to March 2014 be received and approved.

## **5. Joint Archive Service - Revenue Outturn 2013/14**

The Committee considered a joint report presenting the final outturn for the Joint Archive Service for 2013/14 (Schedule 2 to the signed minutes).

The outturn showed that the service had a net spend of £658,155 compared with an approved budget of £667,300 giving an underspend of £9,145 which was transferred to the General Reserve at the end of the financial year. The General Reserve now had a balance of £95,148. The Archive Acquisition Reserve had a balance of £62,342 towards the purchase of new collections for the benefit of archive users in the County and City. It was noted that final income levels were also up by £7,986, due to increased sales and fees charged. The Committee were reminded that the Joint Archives Committee was required to complete a Small Bodies in England Annual return for the year ended 2014 and this had been completed and would be available for the Chairman to sign, when approved.

**RESOLVED** – (a) That the report be received;

(b) That approval be given for the Chairman to sign the completed Small Bodies Return for submission.

## **6. Project to Centralise Staffordshire Archives and William Salt Library in a new Gateway to the County**

The Committee considered a joint report updating them on the project to centralise Staffordshire Archives and William Salt Library in a new Gateway to the County. (Schedule 3 to the signed minutes).

The focus of this project was to bring together Archive Service collections onto one site, from Lichfield and Stafford, alongside those of the William Salt Library. This would enable both services to improve the visitor experience, preserve priceless archive material and expand record storage facilities to meet the current and future storage demands and also comply with the required British Standards.

The County Council and William Salt Library Trust have been working together to assess options for the improvement of the storage and access of the William Salt Library Collection. A number of options had been considered for providing more storage to enable collections to continue to expand, provide good onsite facilities for public access, engagement and outreach activities, volunteer projects, exhibition space and visitor facilities alongside the virtual access to collections.

The current proposal seeks to extend the Staffordshire Record Office site to provide a new reading room and two floors of storage. This would enable both the Archive Service and the William Salt Library to deliver a modern public service with sufficient storage to accommodate collections from across the county archive service and allow 15-20 years growing space. It would allow the release of one County Council property and enable the Trustees of the William Salt Library to vacate their building. It would also remove the County Council's commitment through a lease with the William Salt Library Trustees which includes an annual building maintenance cost of £75,000. The delivery of this project relies on being successful with the stage one HLF bid and matched funding, primarily from the County Council which had been confirmed.

Constructive and positive suggestions had been fed-back to the project team following public consultation undertaken in January 2014. The results / comments of consultation were summarised in Appendix 2 to Schedule 3 to the signed minutes. The Committee noted that consultation results had been used to shape the current proposal and support the stage 1 HLF bid and if the project succeeds at this stage further consultation would be carried out. The project team would aim to listen to concerns and, where possible, deliver practical solutions which develop the project up to the point of the stage 2 bid. The County Council was looking at the issues concerning the William Salt Library and Lichfield Record Office as a whole, rather than separately, to ensure that its resources are used most effectively. By working together in partnership with the William Salt Library Trust it was seeking to provide a stronger, more resilient service with more storage, new facilities for physical access, harness online access, and utilise staffing all on one site.

**RESOLVED** – that the project update to centralise Staffordshire Archives and the William Salt Library in a new Gateway to the County, be received.

**7. Date of next meeting - 20 November 2014 at the County Record Officer, Eastgate Street, Stafford**

**RESOLVED** – That the next meeting of the Staffordshire and Stoke-on-Trent Joint Archive Committee be held on Thursday 20 November 2014 at 10.30 am at the County Record Office, Eastgate Street, Stafford.

**Chairman**

Local Member Interest
N/A

## **Staffordshire and Stoke on Trent Joint Archives Committee - 20<sup>th</sup> November 2014**

### **Joint Archive Service – Predicted Outturn 2014/15**

#### **Recommendation(s)**

1. That this report informing the Committee on the predicted outturn for the Joint Archive Service for 2014/15 is received and noted.
2. That the request to use £4,800 from the Archives Acquisition Reserve be considered and approved.

#### **Joint report of the Director of Finance & Resources and the Assistant Director – Finance Services**

#### **Reasons for Recommendations**

3. The Joint Archive Service budget for 2014/15 is predicted to be underspent by £13,112. The General Reserve currently has a balance of £95,148 and the Archive Acquisition Reserve has a balance of £62,342.

#### **Background**

4. The predicted outturn for the Joint Archives Service is set out in Appendix 2. It is expected that the service will spend £663,924 compared to its current approved budget of £668,180. This gives an overall underspend of £13,112 which will be transferred to the General Reserve at the end of the financial year.
5. Of this underspend, Core Services are expected to nominally overspend by £830 on staffing costs. The County is projecting an underspend of £8,002 due to savings on staffing costs and the City Council is also anticipating to underspend by £5,940 due to savings on staffing costs being partially offset by an under recovery on fees & charges income.
6. There are currently two reserves which are held by the Joint Archive Service, these being the General Reserve and the Archive Acquisition Reserve. The balances on these two Reserves are set out in Appendix 3. The General Reserve has a balance of £95,148 and the Archive Acquisition Reserve currently has a balance of £62,342. The Archive Acquisition Reserve enables the Joint Archive Service to purchase collections for the benefit of archives users in both the City and the County.
7. Permission is sought to use £4,800 of the Archives Acquisition Reserve for the purchase of the Geoffrey Godden Collection for Stoke on Trent City Archives. The collection falls within the Service's collection policy and is being offered at a discounted price by Mr Godden. Appendix 4 gives details of the items within the collection.

## **Appendix 1**

### **Equalities implications:**

No significant implications.

### **Legal implications:**

The Joint Agreement budget is subject to an annual small bodies audit.

### **Resource and Value for money implications:**

The Joint Agreement budget is monitored regularly throughout the year.

### **Risk Implications:**

No significant implications.

### **Climate Change Implications:**

No significant implications.

### **Health Impact Assessment screening:**

No significant implications.

### **Report author:**

Author's Name: John Broad, Principal Accountant (Place)

Telephone No: (01785) 854861

Room Number: Staffordshire Place 2

### **List of Background Papers**

Joint and other Archive Services 2014/15 files



Joint Archives Service  
Predicted Outturn Position 2014-15

APPENDIX 2

	Core Services			Staffordshire County Sites and Public Services			Stoke City Sites and Public Services			Total for service		
	Current Estimate 2014/15 £	Actual Expenditure as at Oct 2014 £	Predicted Outturn 2014/15 £	Current Estimate 2014/15 £	Actual Expenditure as at Oct 2014 £	Predicted Outturn 2014/15 £	Current Estimate 2014/15 £	Actual Expenditure as at Oct 2014 £	Predicted Outturn 2014/15 £	Current Estimate 2014/15 £	Actual Expenditure as at Oct 2014 £	Predicted Outturn 2014/15 £
<b>Expenditure</b>												
Employees	344,630	195,961	346,139	232,380	126,077	224,069	94,130	42,862	86,000	671,140	364,900	656,208
Travel	1,200	622	827	0	0	0	870	0	870	2,070	622	1,697
Transport	1,900	623	1,611	200	165	328	300	15	300	2,400	803	2,239
Supplies and Services	5,740	341	5,803	28,070	6,654	28,622	19,150	9,147	19,150	52,960	16,142	53,575
<b>Total Expenditure</b>	<b>353,470</b>	<b>197,547</b>	<b>354,380</b>	<b>260,650</b>	<b>132,896</b>	<b>253,019</b>	<b>114,450</b>	<b>52,024</b>	<b>106,320</b>	<b>728,570</b>	<b>382,467</b>	<b>713,719</b>
<b>Income</b>												
Grants & Reimbursements										0	0	0
Sales				11,980	5,735	12,004				11,980	5,735	12,004
Fees & Charges				19,440	8,982	19,440	6,190	1,848	4,000	25,630	10,830	23,440
Miscellaneous	2,880	2,000	2,960	2,140	1,419	2,487				5,020	3,419	5,447
Transfers from reserve				4,800	955	4,800				4,800	955	4,800
<b>Total Income</b>	<b>2,880</b>	<b>2,000</b>	<b>2,960</b>	<b>38,360</b>	<b>17,091</b>	<b>38,731</b>	<b>6,190</b>	<b>1,848</b>	<b>4,000</b>	<b>47,430</b>	<b>20,939</b>	<b>45,691</b>
<b>Net Expenditure</b>	<b>350,590</b>	<b>195,547</b>	<b>351,420</b>	<b>222,290</b>	<b>115,805</b>	<b>214,288</b>	<b>108,260</b>	<b>50,176</b>	<b>102,320</b>	<b>681,140</b>	<b>361,528</b>	<b>668,028</b>
										<b>PREDICTED UNDERSPEND</b>		<b>-13,112</b>



**JOINT ARCHIVES GENERAL RESERVE**

**APPENDIX 3**

**As @ 1st November 2014**

	<b>Staffordshire County Council £</b>	<b>Stoke on Trent City Council £</b>	<b>Total £</b>
<b>Balance brought forward 1 April 2013</b>	<b>73,573</b>	<b>12,430</b>	<b>86,003</b>
<b>2013/14</b>			
Alterations/Environmental Controls at Stoke	0	0	0
	<hr/>	<hr/>	<hr/>
	<b>73,573</b>	<b>12,430</b>	<b>86,003</b>
Transfer to/(from) reserve 31.3.14	19,575	-10,430	9,145
<b>Balance Available</b>	<b>93,148</b>	<b>2,000</b>	<b>95,148</b>

**JOINT ARCHIVES ACQUISITION RESERVE**

<b>Balance brought forward 1 April 2013</b>	<b>62,342</b>	<b>0</b>	<b>62,342</b>
<b>2013/14</b>			
	0	0	0
<b>Balance Available</b>	<b>62,342</b>	<b>0</b>	<b>62,342</b>



## Appendix 4 - Geoffrey Godden collection

The renowned writer and researcher on the history of ceramics, Geoffrey Godden, is arranging for his large and important collection of ceramic photographs, research notes, transcripts and slides to be deposited at Stoke on Trent City Archives.

He has obtained by purchase over the years three archive items which have also supported his research and the conclusions presented in over 60 publications, several of which are definitive. These items are:

1. A collection of invoices and itemised descriptions of ceramic services as supplied from the manufacturers to the retailer or end customer. They provide information that seldom survives within the factories' own records, if these survive at all about the usage of earthenware, the typical assemblages and prices that existed. These range in date from the 1790s to the 1920s. There are over 100 items in the collection and while most would retail from between £20-40, some more recently purchased examples have been acquired at auction for around £200, with one particularly detailed and informative item relating to the Spode factory being £700. Spode historian Pam Woolliscroft has described this last as a document from which there is a great deal more to learn. Sale price to the Archive Service is £2,500.
2. Samuel Alcock pattern book. The ceramic expert Robin Emmerson, chairman of the Northern Ceramic Society, states that the discovery and identification of this book was and continues to be crucial in identifying the early porcelains of Alcock from the 1820s and early 30s. At the time Geoffrey Godden published Staffordshire Porcelain in 1983, only Alcock's later wares had been identified. The business was already one of the most important producers of porcelain in the Potteries in the late 1820s. Mr Godden values this book at £1,500 but is prepared to sell to the Archive Service for £1,300.
3. A 'factory unidentified' pattern book from the early nineteenth century. Mr Emmerson notes that work continues on finding porcelain whose shapes and pattern numbers match the entries in this early 19th century book. As soon as one of these shapes or pattern numbers is found on a marked piece of porcelain, this unidentified Staffordshire factory pattern book will acquire a name and address and will be used to identify the factory's currently unidentified products. Experience with other pattern books suggests this will be only a matter of time. Mr Godden is prepared to sell this item for £1000

Permission of the Committee is sought to use the Archive Service purchase funds to secure these items. The City Archivist of Stoke on Trent has inspected all three. The total purchase price of £4,800 would almost certainly be exceeded if the items went to auction and the opportunity to maintain the integrity of Mr Godden's unparalleled research collection on Staffordshire ceramics would be lost.



Local Members Interest
N/A

## **Staffordshire and Stoke on Trent Joint Archive Committee - 20 November 2014**

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### **Staffordshire and Stoke on Trent Archive Service: Review of Fees and Charges 2015-2016**

#### **Recommendation(s)**

1. That the fees and charges proposed in Appendix two to this report be approved for introduction by the Joint Archive Service from April 2015.

#### **2. Report of Deputy Chief Executive and Director for Place (Staffordshire County Council) and Assistant Chief Executive (Stoke on Trent City Council)**

#### **Reasons for Recommendations**

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

#### **Background**

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

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

6. This year the main change to the fees and charges has been the increase of the research fee. This fee is the basis for other charges and means there have been increases to other fees summarised below:

- Research fee
- Quick research fee and Hospital Records search fee
- Marriage bond search fee
- Certification fee
- Aligning photocopy and scanned images charges
- In house photography charge
- Publication fees

6. Take up of the quick research service has shown an increase in the number of orders. The research fee has not been increased for three years and comparisons with other archive services have shown scope for increasing the charge. This increase affects the other search fees and photography charges.

7. The photocopy and simple scanning service has been reviewed and the charges brought in line to ensure a consistent offer for users and simplify copy services. With the implementation of e-payments and improved copying equipment there is increasing demand for digital images rather than hard copies. A faster and more reliable service can be provided by emailing images instead of relying on the postal service, and reduces postal costs for the Service.

8. It is too soon to see what impact the digitisation income will make on existing sources of income but it is anticipated that traditional sources of income such as photocopies, printouts and some research requests will decline as people access material directly online. This will be monitored over the next year with digital income proposed to be used to offset these falls.

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

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

## **Appendix 1**

### **Equalities implications:**

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

### **Legal implications:**

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

### **Resource and Value for money implications:**

Overall the Joint Archive Service has income targets of £48, 870 which breaks down to £7,550 for the City service and £41,320 for the County service.

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



**Risk implications:**

At this point in the year income is under target for research and photocopying at Stafford. Income for photography is on target at Stafford and income from photocopying at Lichfield Record Office is also on target. Other sources of income include the vending machine at Stafford, charges for storage of Public Records transferred early and for provision of conservation training for other archive services. These areas will help to contribute to income targets.

**Climate Change implications:**

No significant implications.

**Health Impact Assessment screening:**

No significant implications.

**Appendix Two****Review of Fees and Charges 2015-2016 – attached to report****Report author:**

Author's Name: Joanna Terry, Head of Archives and Heritage  
Telephone No: (01785) 278370  
Room No: Staffordshire Record Office

**List of Background Papers**

Papers	Contact/Directorate/ext number
Joint Archive Service Scale of Fees and Charges, 2014/2015	Joanna Terry/Place/ x278370
Orders and income ledgers, 2014/2015	



**STAFFORDSHIRE AND STOKE- ON- TRENT ARCHIVE SERVICE****REVIEW OF FEES AND CHARGES, 2015/2016**

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

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
<b>RESEARCH FEES</b>				
<p><b>1. Research fees</b> Includes searches in original documents such as parish registers, calendars of wills, wills, census returns, tithe and enclosure maps, manorial and estate records and local newspapers.</p> <p><b>1.1 Quick research fee</b> A 15 minute look up of a single item in a record e.g. electoral register, parish register or other records and a single copy of an entry where applicable. This does not include searching catalogues.</p> <p><b>1.2 Hospital records search fee</b> This fee is based on the standard photography charge and quick search fee using indexes to locate entries in hospital records. Digital images of the records are included in the fee.</p>	<p>£25-00 per hour to include the cost of up to 4 copies and UK/EU postage</p> <p>Minimum charge- £12-50 to include the cost of 2 copies and UK postage</p> <p>£17.00 per hour to include the cost of up to 4 copies and UK postage for disabled people.</p> <p>£6.25 (£5.21 + £1.04 VAT) First class postage charged additionally. £4 for disabled people.</p>	<p>EU orders: increase</p> <p>£26-00 (£21-60 + £4-40 VAT)</p> <p>First class postage charged additionally. £17-50 for disabled people</p> <p>£6.50 (£5.41 + £1.09 VAT) First class postage charged additionally. £4 for disabled people.</p> <p>£26-00 (£21-60 + £4-40 VAT) plus £6.50 (£5.41 + £1.09 VAT) search fee</p>	<p>Non-EU orders: increase</p> <p>£26-00</p> <p>Non EU postage charged additionally</p> <p>£6.50</p>	<p>This fee has been held for three years in view of the economic downturn. However an increase of £1 is proposed to ensure the fee keeps pace with other services and covers staff costs. Several other charges are based on this fee and therefore they are increased.</p> <p>This service was introduced last year to enable requests for single entries to be dealt with and encourage some income where an enquirer is reluctant to place an order for an hour of research. Confirming the availability of records from the catalogues is still provided free of charge. It goes up in line with the research fee.</p>

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
<b>2. Marriage Bond Searches</b>	<p>£12-50 for up to 2 searches and including provision of up to 4 copies of marriage licence records. UK postage included. Overseas postage charged at current rates.</p> <p>Single search £6.25 (£5.21 + £1.04 VAT) and provision of single copy. First class postage charged additionally.</p>	<p>EU Orders:</p> <p>£13-00 (£10.83 + £2.17 VAT) for up to 2 searches and including provision of up to 4 copies of marriage licence records. Standard UK/EU postage included. First class postage charged additionally.</p> <p>£6.50 (£5.41 + £1.09 VAT) and provision of single copy. First class postage charged additionally.</p>	<p>Non-EU orders:</p> <p>£13-00 for up to 2 searches including provision of 4 copies of marriage licence records. Non EU postage charged additionally</p> <p>£6.50 (£5.41 + £1.09 VAT) and provision of single copy. First class postage charged additionally.</p>	<p>This fee is set in line with the standard research fee.</p>
<b>3. Search and supply of copy of individual's baptism / marriage entry for official purposes</b>	<p>Successful search with copy supplied £8.00</p> <p>Unsuccessful search £5-00</p>	<p>Successful search with copy supplied £10.00 (£6.50+£3.50)</p> <p>Unsuccessful search £6-50</p>		<p>This fee was last increased in 2011 and goes up in line with the research fee increase.</p>
<b>4. Transcription fee for documents identified in online indexes</b>	<p>£7.00</p>	<p>EU orders No change £7-00 (£5.84 + £1.16 VAT) Includes</p>	<p>Non EU orders No change £7-00</p> <p>Non EU postage charged</p>	<p>This fee was last increased in 2011 and covers a range of sources which are copied or transcribed from the Staffordshire Name Indexes website.</p>

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
		standard UK/EU postage	additionally	
<b>5. Certification fee</b>	£12-50 per document	£13-00		The certification fee is linked to the research fee and therefore goes up. Certifications are hand-written by the Head of Service and often at very short notice to meet administrative / ecclesiastical /legal requirements.
<b>COPYING CHARGES</b>				
<b>6. Photocopies identified and ordered in reading rooms</b>	60p per copy A4/A3 (B&W)	EU orders: No change 60p per copy (50p + 10p VAT) £1.50 per copy A4/A3 colour ( £1.25 + 25p VAT)	Non EU orders: No change 60p per copy  £1.50 per copy A4/A3 (colour)	This fee was increased in 2012 and is held this year.
<b>7. Photocopies ordered by post</b>	First copy, incl. UK postage and packing £3-50 (£2.92 + £0.58 VAT)  Successive copies on same order- 1-00 (£0.83 + £0.17 VAT) per copy	EU orders: First copy incl UK standard postage and packing £3-50 (£2.92 + £0.58 VAT) First class postage charged additionally. Successive copies on same order – no change £1-00 (£0.83 + £0.17 VAT)	Non EU orders: First copy/scan £3-50 Successive colour copies/scans on same order – £1-50 Successive B&W copies £1-00  Non EU postage charged at current rates	The charges were increased last year and are held this year. However the charge for scans under section 12 are to be brought together as the same process is followed and this streamlines the service. Copies will be sent by email where possible to reduce administration time, postage costs and speed up the fulfilment of orders.

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
<b>8. Photocopies of wills by post- staff assisted</b>	Flat rate of £5-50 per will irrespective of the number of photocopies and to include UK post and packing  Flat rate of £7-50 for international orders to include postage	EU orders: No change Flat rate of £5-50 per will irrespective of the number of photocopies and to include UK standard post and packing  First class postage charged additionally	Non-EU orders: No change Flat rate of £7-50 including non-EU postage	The UK fee was last increased in Jan 2011. The fee was increased for non-EU orders in 2012. This fee will be held this year but it is noted that the wills will be digitised in 2015.
<b>9. Microform print outs : self service in reading rooms</b>	60p- self service	No change		This fee was increased in 2010 to take account of assistance given to customer and the increase in VAT. It is held this year to keep it in line with photocopies
<b>10. Microform print-outs by post</b>	£3-50 (£2.08 + £0.42 VAT) for first copy £1.00 for each additional print-out	EU orders:  £3-50 (£2.08 + £0.42 VAT) for first copy £1-00 (83p + 17p VAT) for each additional print out  First class postage charged additionally	Non-EU orders:  £3-50 for first copy £1.00 for each additional print out  Non EU postage charged additionally	The first copy price was increased last year is held along with the additional print cost.
<b>11. Computer print outs on site</b>	10p	No change		This charge has been held in line with Library Service fees in the County and the City.

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
<b>12. Digital (scanned) images from original documents</b>	£3.00 per image	EU orders £3-00 per image (£2.50 50p VAT)	Non EU orders £3-00 per image (£2.50 50p VAT)	The scanned image costs are now aligned with the photocopy charges under section 7. The service is carried out on the same multi-functional device and only delivery to the customer is different. It is proposed to remove this separate charge to simplify the fees and charges.
<b>13. In-house Photography Charges</b>	£25 per hour fee for photography including prints  Additional charge of £12-50 per half hour on any order involving conservation team	EU customers  £26-00 (£21-60 + £4-40 VAT) £13-00 (£10.83 + £2.17 VAT) per half hour	Non EU customers  £26-00 (£21-60 + £4-40 VAT)	The scanning and photography charges were substantially reviewed in 2012. The fee goes up in line with the research fee.
<b>14. Permit Fees for Use of Digital Camera</b>	£7-00 daily fee £50-00 annual fee	£7-00 daily fee £50-00 annual fee  No change		The daily and annual fees were increased in 2012. The fees are held this year.
<b>15. Photography on Archive Service premises</b>	Proportion of additional staff time required to facilitate and supervise photography based on current research fee scale	No change		This charge is linked to the research fee.
<b>16. Photographic and microfilming orders handling fee for commercial orders</b>	Flat rate of £50-00	EU orders:  No change £50-00 (£41.67 + £8.33 VAT)	Non EU orders:  £50-00	The Archive Service uses the nearest archive service which offers this service and which can provide the requisite security and quality standards. However this necessitates a greater input of staff time in transporting documents for filming.

FEE/CHARGE	CURRENT	PROPOSED	COMMENTS
<p><b>17. Publication fees for the reproduction of documents in: exhibitions, hard copy or online publications or media broadcasting.</b></p>	<p>Sliding scale of charges according to the nature of the publication, print run or broadcast</p> <p>Community /academic journal publication/ website/ exhibition/ DVD: £10-00 for first item, plus £5-00 for each additional item</p> <p>Commercial publication: hard copy/exhibition/ website: £30-00 for first item, plus £10-00 for each additional item</p> <p>Commercial publication: hard copy/exhibition/ website and e-book rights £50-00 for first item and £20-00 for each additional item as a wrap up fee for both hard copy and e-book rights</p> <p>Multiple commercial publication e.g. cards £60-00 for print run of up to 1000; £10-00 for each additional 1000</p> <p>TV broadcast and onsite filming: standard fee set at £160 for world wide rights for first item; £60-00 for each additional item. Filming on site only £160 per half day.</p>	<p>No change</p> <p>£35-00 for first item, plus £15-00 for each additional item</p> <p>Commercial publication: hard copy/exhibition/ website and e-book rights £60-00 for first item and £25-00 for each additional item as a wrap up fee for both hard copy and e-book rights</p> <p>This category of charge is rarely used and it is proposed to use the above commercial fees and remove this to simplify the charging scheme.</p> <p>£170 for world wide rights for first item; £65-00 for each additional item. Filming on site only £170 per half day.</p>	<p>These fees are held for this year.</p> <p>These fees were last increased in 2011 and are increased for commercial use this year.</p> <p>Again these fees are increased for commercial use.</p>



FEE/CHARGE	CURRENT	PROPOSED	COMMENTS
	<p>Commercial DVD : £60-00 for first item; £5-00 for each additional items</p> <p>World wide web publication: £160 for first item; £60 for each additional item</p>	<p>It is proposed to charge the same fee as for commercial publications and remove this category to simplify the charging scheme.</p> <p>As above it is proposed to use the above fees and remove this category.</p>	

OUTREACH SERVICES	CURRENT	PROPOSED	COMMENTS
<p><b>18. Talks to / visits by external organisations and groups</b></p> <p style="writing-mode: vertical-rl; transform: rotate(180deg);">Page 23</p>	<p>£45-00 County/City £50-00 out of county</p> <p>Saturday group visits: £50-00</p>	<p>£45-00 County/City groups £50-00 Out of county groups</p> <p>Saturday group visits: £50-00</p> <p>(£5 extra for out of county groups) £50-00 group visit including tour of strongrooms £55-00 group visit including tour of strongroom and also visit to conservation workshop</p>	<p>These fees were last increased in 2013 and at the recommendation of the JAC travel expenses for out of county talks were added on. They are held this year.</p> <p>Fees may be waived for retired / disabled groups at the discretion of the Archive Service. The proposed fees are in line with the County Museum scale of fees. Group visits on Saturdays require additional staffing.</p>
<p><b>19. Use of meeting room (LARC) at Staffordshire Record Office</b></p>		<p>Per four hour session</p> <p>£20 SCC meetings, adult education, local history and other societies, non-profit making local organisations or individuals</p> <p>£58 commercial companies</p>	



<b>Members Interest</b>
N/A

## **Staffordshire and Stoke on Trent Joint Archive Committee - 20 November 2014**

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### **Staffordshire and Stoke on Trent Archive Service: Digital Engagement Strategy**

#### **Recommendation(s)**

1. That the Digital Engagement Strategy for Staffordshire and Stoke on Trent Archive Service, as at Appendix 2, be approved.

#### **Report of Director for Place and Deputy Chief Executive (Staffordshire County Council) and Director of People – Assistant Chief Executive (Stoke on Trent City Council)**

#### **Reasons for Recommendations**

2. A Digital Engagement Strategy has been introduced to set a framework for the Service and its use of social media and digital communication.

#### **Background**

3. Staffordshire and Stoke on Trent Archive Service has developed a Digital Engagement Strategy to ensure that new and existing channels of communication are used together and effectively to reach new audiences. The Strategy draws on a social media strategy for the Museum on the Move and work done towards a web content strategy in 2008 which was not introduced due to lack of technical solutions.

4. The Strategy assesses the growth of social media and its impact and also summarises current digital engagement and channels:

- Main website
- Staffordshire Past Track
- Online catalogue
- Staffordshire Name Indexes
- Find My Past
- Facebook
- Twitter
- Mailing lists

The current channels will be retained but with a clear focus on their purpose and how they can be used to engage effectively.

5. New objectives were set for using these channels, implementing new ones, and setting up a team to own the Strategy and deliver it. They include:

- Using the main website for service information and updates.
- Transferring Staffordshire Past Track to a new platform to continue delivering access to collections and enable greater user interaction with them.
- Continue to use a mix of professional and volunteer skills to add content to the Online Catalogue.
- Market the Staffordshire Name Indexes website to the family history community and consider further development to maximise income.

- Promote Find My Past to the local family history community and ensure library staff are familiar with the new resource.
- Use Facebook, Twitter and blogging to promote other channels and collections in an informal, engaging, conversational manner.
- Establish a team to implement the strategy and set up performance measures to check its effectiveness.
- Work within the guidelines of the two parent authorities.

6. The Strategy will be reviewed in three years time to ensure it stays up to date as new digital engagement channels are developed.

## **Appendix 1**

### **Equalities implications:**

The Strategy will help the Service to reach a wider range of audiences than it does currently.

### **Legal implications:**

Staff have been given training and guidelines to ensure communications do not harm the reputation of either authority.

### **Resource and Value for money implications:**

The Strategy supports promotion of two sites to generate income.

### **Risk implications:**

No significant implications.

### **Climate Change implications:**

No significant implications.

### **Health Impact Assessment screening:**

No significant implications.

### **Report author:**

Author's Name: Joanna Terry, Head of Archives  
 Telephone No: (01785) 278370  
 Room No: Staffordshire Record Office

### **List of Background Papers**

Papers	Contact/Directorate/ext number
Staffordshire and Stoke on Trent Archive Service: Digital Engagement Strategy	

## Appendix 2

### Archives and Heritage Service Digital Engagement Strategy

#### 'Engaging, Sharing and Reporting'

\*\*\*\*\*

#### 1. Background to the Service

Staffordshire Archives and Heritage is made up of the Staffordshire and Stoke on Trent Archive Service and the County Museum Service. It also manages the William Salt Library on behalf of the charitable trust that administers the Library.

The aim of the Service is to locate, collect and preserve irreplaceable archive and museum collections relating to the past and present life and work of people of the County of Staffordshire and the City of Stoke on Trent and to preserve the archives of the Diocese of Lichfield, thereby contributing to the national network of archive and museum care.

#### 2. Aim of this Strategy

The Service is seeking new ways of engaging with audiences to promote the collections in its care; awareness of activities and events to encourage people to use of material; a way of reaching new audiences to ensure the Service is relevant to residents and visitors to the County and City.

This strategy aims to provide an integrated and cohesive web and social media strategy for Staffordshire Archives and Heritage that supports the services wider aims as set out above.

Staffordshire Archives and Heritage does not currently have a Social Media Strategy or a Web Content Development Strategy. A draft *Web Content Development Strategy* was developed for the Archive Service but not adopted and a *Social media strategy for Museum on The Move* was commissioned in March 2013. This strategy draws on both of these documents and will work within the County Council Social Media Strategy once it is published.

#### 3. Changing Market

By 2012, Ofcom's annual Market Survey reported that

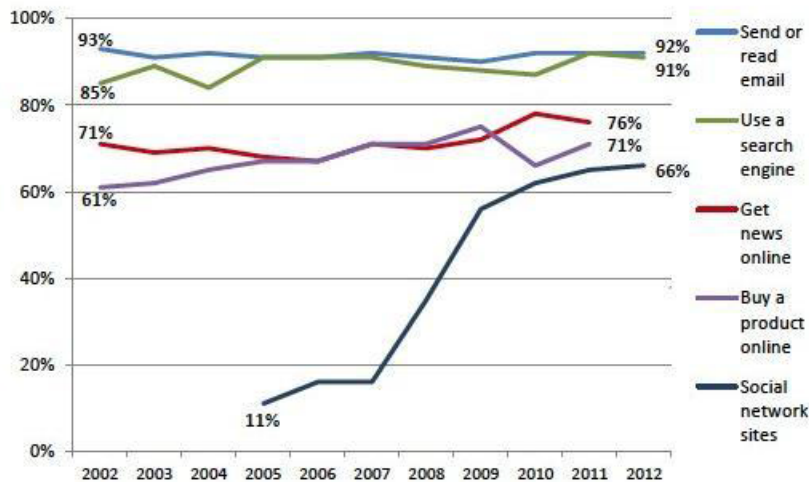
- UK Tablet ownership had jumped from 2% to 11% in 12 months [2011-2012]
- 20% of UK adults now had an e-reader
- 40% of UK adults now own a smartphone, with the same proportion saying their phone is their most important device for accessing the internet
- UK households now own on average three different types of internet-enabled device such as a laptop, smartphone or internet-enabled games console with 15% of households owning six or more devices

The rapid rise in ownership and availability of mobile internet-connected devices, such as tablets and smartphones, has brought about a radical shift in the ways in which internet users, young people in particular, expect to engage with learning, working and socialising.

How do the public use social media, the internet and digital technology?

The following graph issued as a result of the Pew Research Centre's Internet & American Life Project tracking surveys, 2002-2012, show that, whilst US users have fairly consistently used the internet for information searches, news updates and shopping, social networking has shot up by 55% since 2007.

*% of internet users who do each activity*



- In fact, phones are increasingly less likely to be used for direct speech at all.
- The average UK consumer now sends 50 texts per week which has more doubled in four years with over 150 billion text messages sent in 2011.
- 58% of UK adults text friends and family at least once a day
- Around 90% of 16-24 year olds send texts to communicate with friends and family on a daily basis

### How does this affect behaviour?

*'Our research reveals that in just a few short years, new technology has fundamentally changed the way that we communicate. Talking face to face or on the phone are no longer the most common ways for us to interact with each other. ... newer forms of communications are emerging which don't require us to talk to each other especially among younger age groups. This trend is set to continue as technology advances and we move further into the digital age.'*

James Thickett, Ofcom's Director of Research

In the past, if someone wanted to share a thought or experience they would phone or talk to an individual, their family, a class or a group of friends. Mass communication was the realm of marketers and journalists. With the advent of social media and easy access to the internet, what were once private, one-to-one interactions, or personal observations can now be recorded and shared very quickly and easily via social media – society has become one of Self-documenters or Sharers and with these growing expectations. The

purpose of this strategy is to address these changes and expectations in a manageable way.

#### **4. Archives and Heritage Current Digital Services**

Currently Staffordshire Archives and Heritage provides (digital) information about the service and its holdings via a variety of means which have evolved and been subject to changes over many years. The following channels of access are currently provided:

##### *4.1 County Council Web sites*

The County Council's main website is centrally controlled in terms of format and style through its content management system, and strict quality control procedures. The Archive Service website purpose is to provide service information for customer transactions rather than provide deeper engagement.

The Museum Service pages are used to provide basic information about the service, including the collections, exhibitions and events, Museum on the Move, Staffordshire Past Track, and contact details.

The primary function of the County Council website is to provide service information and it complies with national standards. As such it is less suitable for marketing, promotion, and visually exciting presentation of collections to attract users.

##### *4.2 Staffordshire Past Track*

Staffordshire Past Track was developed in 2002-4 by the County Council's Education Department and Arts & Museum Service, and funded by the New Opportunities Fund. It now has over 26,800 resources, and at least 500 resources are being added each year. There were 240,628 visitor sessions to the site for the 12 month period April 2012 to March 2013, an average of over 20,000 sessions per month.

The original target audiences for the website were schools and further education establishments. Since 2003 this audience has extended and reaches an international audience of family historians, academics, the media, and indeed anyone interested in the history and heritage of Staffordshire.

Content comes from the County Council's archive, museum and art collections, and from collections held by museums, libraries, universities, schools, local history groups and private individuals across Staffordshire. These community groups are now regular contributors, and Past Track is their chief means of giving access to their important collections. It is now the major on-line local history resource for the County. It also provides an important means of income generation for the Museum Service, Archive Service and William Salt Library by sale of images and reproduction fees.

Staffordshire Past Track is also the home to a wide range of 'featured content' websites – on-line exhibitions relating to aspects of Staffordshire history. There is now an imperative need to redevelop the website. There are technical issues which are chiefly around the impending obsolescence of the Content Management Software and hosting platform. These will no longer be supported by Staffordshire County Council after 2015.

There is also a need to update the website from a user's point of view; the style of the website is very much that of a decade ago, with little opportunity for user interaction. Today, users expect much more of a 'conversation' when using the internet, and likewise the Service would like to make it easier for users to upload their own images, have discussions about the resources on Staffordshire Past Track, and to be able to purchase images in a more intuitive fashion.

#### *4.3 Online Catalogue*

'Gateway to the Past', established in 2002 with Heritage Lottery Fund support, is the online catalogue for the Staffordshire and Stoke on Trent Archive Service, the William Salt Library and Staffordshire County Museum. The catalogue database currently holds a little in excess of half a million records. During the intervening period three various archive holding bodies have indicated a willingness to have their catalogues hosted on 'Gateway to the Past', but without a concrete result.

#### *4.4 Staffordshire Name Indexes*

This currently has a series of archive based indexes, some of which provide information for free, while others bring in some income. It is a popular site and has featured in a national publication. In 2013-14 the Staffordshire Name Indexes site ([www.staffsnameindexes.org.uk](http://www.staffsnameindexes.org.uk)) received 23,068 visitors and 288,060 page views. In total it generated around £5,500 in income for the Archive Service. The content is created through volunteer work which engages them in opening up access to our collections. The site currently only offers access to indexes rather than images with orders fulfilled by staff.

#### *4.5 Find my Past*

Findmypast is one of the leading commercial online family history providers. They currently offer more than 1.7 billion international family history records from the U.K., U.S., Canada, Australia, New Zealand and beyond, with records going back to 1200. The Staffordshire Collection (phase 1) was launched on this website in July 2014. The first quarter statistics have shown 19,437 users viewing 340,680 records. The site offers access to images and indexes and is marketed and promoted worldwide. It will generate significant income for the Service.

#### *4.6 Facebook*

Facebook is the 2nd most popular website in the UK. 51.2% of UK population have signed up to Facebook. The Staffordshire Archives and Heritage Facebook page has 422 likes (Oct 2014). This has developed organically and anecdotal evidence seems to suggest that people want information about the service along with attractive postings of items from our collections. We have achieved this mix with moderate success. Staffordshire Past Track also has a Facebook site, launched in June 2013, with 355 likes. It features content and images from the website.

#### *4.7 Twitter*

The Service introduced Twitter in July 2014 to coincide with the launch of the Staffordshire Collection on Find My Past and has 337 followers (Oct 2014). A new approach has been tested with ownership given to team champions within the Service. This team have been given guidelines to work within ensuring the County and City Council's reputations are preserved and promoted. It has been moderately successful and reaches a slightly different audience to Facebook. However statistics below show the potential to reach a much larger group of followers:



#### Twitter followers of other archive services, March 2014

Manchester Archives	7850	Others	
Tyne and Wear Archives	3698	Ironbridge Gorge Museums	5261
The Hive	3436	Heritage, Warwickshire	2968
Wolverhampton Archives	1788	Museum of East Anglian Life	3716
Birmingham Archives	1345	Birmingham Museums Trust	20,000
Walsall LHC	936	Wedgwood Museum	5382
		Shugborough	3178
		Staffs Newsletter	6361
		Lichfield Bower	926
		Shire Hall Gallery	700

#### 4.8 Mailing Lists

The Archive Service has an electronic mailing list, which is used for events promotion and sending out PDF versions of the service newsletter 'From History to Today'. Currently the service prints 1,500 copies. The archive service has 145 people on its postal events mailing list and 181 people on our e-mail events mailing list. Work is underway to develop a database of registered users of the Service to market more effectively to users.

#### 4.9 Current web statistics

Site / Visits	2012-13	2013-14
SCC main website		
Archive Service	76,029	69,614
William Salt Library	7,608	6,233
Museum Service	22,840	18,428
Online catalogue	134,641	132,230
Staffordshire Pasttrack		
Museum resources	240,628	197,860
Archive Service & WSL resources	34,654	26,840
Staffordshire Name Indexes	20,403	23,068
Facebook (Likes)		
Archive and Heritage Service	-	306
Staffordshire Pasttrack	-	252
Facebook (Reach)		
Archive and Heritage Service	-	13,208
Staffordshire Pasttrack	-	21,212

#### 5. Opportunities

Used creatively and responsibly, social media applications provide a valuable toolkit for addressing parts of the audience that archives and museums have not traditionally engaged with.

The most damning charge, that they are 'a waste of time' is given the lie by the sheer depth of the market penetration. Even if people are not on Twitter, they know what it's for and experience its effects every day. By its very democratic nature, social media enables audiences to engage more fully with each other and with services, prompting

conversations and debates about the content of exhibitions and activities and encouraging existing supporters to deepen their relationship with the services they love.

By exploiting different social media tools and the content they already provide, services can address the following areas of development:

- Marketing & profile building
- Engaging and consulting
- Enhancing the learning experience
- Reporting/recording and sharing
- Evaluating the service impact

Social media has become strongly associated with marketing and profile building. Despite being perceived as 'only for young people', the audience profiles of popular networking sites given above demonstrate that is not necessarily the case. The biggest growth area on Facebook currently is the 45-64yr age bracket.

As a service we are quite poor at telling people what we do and often appear inward looking. Social media is about sharing rather than simply telling people in an authoritative way about our collections. People want to feel engaged, to have a conversation with us about our collections and what we do. The answer to this is not a technological one; if we are to do this then it requires a cultural shift to 'sharing' rather than one of 'telling'.

## **6. Archives and Heritage Future Digital Services**

### *6.1 County Council Web site*

This website should remain the place to find out factual information about the service, how to make a visit, consultations, latest news. A place for key transactions such as placing orders, requesting information about visiting and the point at which links can be made to other digital content.

### *6.2 Staffordshire Past Track*

We see an increasing number of volunteers wishing to carry out research, a website that could provide an outlet for this would be a very positive step

- Staffordshire Places should be incorporated into the design of the project with a new project plan that will incorporate local community engagement
- The new website needs to include the opportunity for local groups to interact and engage with the content.
- Resources on Past Track need to be linked in with social media – e.g. 'share' buttons
- Purchase of copy prints / digital files needs to be much easier – considerable potential for income generation.

### *6.3 Online Catalogue*

It is important that the content on the catalogue is created under the supervision of professional staff as the authorised presentation of information about collections which can be referred to by users. Volunteers currently support the creation of more detailed catalogues using templates and guidance provided by professional staff. This approach should continue but with better promotion of the collections that are catalogued on it.

#### *6.4 Staffordshire Name Indexes*

This site should continue in its current format as it opens up access to our collections, is responding to user demand, brings in some revenue and provides an important resource/outlet for volunteer produced content. An appraisal of the further opportunities to make online ordering easier and better promotion to maximise income will be carried out. The current tithe map indexing project will be the next major resource to be added to this site within the next two years.

#### *6.5 Find my Past*

In 2013-14 The Archive Service signed a commercial contract licensing DC Thompson Family History to digitise key family history sources (parish registers, wills and marriage bonds and allegations), and publish them on the 'Find My Past' website, in exchange for royalties. The contract allows for the addition of further sources by mutual agreement. From the Archive Service perspective, bishops' transcripts and nonconformist registers electoral registers, and land tax records are potential candidates. These collections will be prioritised for addition to this website.

#### *6.6 Facebook*

Over 50% of UK population have Facebook. Posts need to be entertaining but the last year has shown that it is not enough to show interesting items, people also want access to information, it is variety that people seem to enjoy.

- Facebook should become our own form of press release, all news items should go onto Facebook, as should new accessions, new catalogues, events news etc.

#### *6.7 Twitter*

Twitter is a more immediate form of communication which can be used in conjunction with Facebook. We should continue to develop this method of communication.

- We can tweet links to Facebook postings but also combine to be more 'conversational'.
- For Twitter to work we will continue the wider access to it across the service.

#### *6.8 Mailing Lists*

The service should prioritise this direct form of communication and look to increase numbers on the mailing list. It is possible to get more messages out through our emailing list and is more cost effective.

- We should be working towards electronic mailing lists only.

#### *6.9 Flickr*

Flickr is an image hosting site although not one that is easily searchable. As a history resource it has very limited metadata attached which is necessary for searches to be effective. However this does not preclude using it as an adjunct and additional promotional tool, e.g. encouraging users to use flickr to post their own images, or share images from Past Track.

#### *6.10 Blogging websites*

**Wordpress** is currently the most popular free open source content management system and blogging tool, with a 54.6% market share worldwide. There are 62.8m Wordpress sites worldwide and over 388m people view more than 3.6bn pages each month.

Staffordshire Archives and Heritage does not have a blog, other services locally that do are:

Walsall Local History Centre  
<http://webwalsall.com/local-history-centre/?p=213>  
Birmingham Archives and Heritage  
<http://theironroom.wordpress.com/>

The Service contributes to a wider County Council project website the Staffordshire Great War Trail, <http://www.staffordshiregreatwar.com> which does have blogging facilities.

- The Service will implement the blogging facility on the Great War and assess suitability for other projects.

## **7. Measuring performance**

Having invested so much effort into preparing and using social media feeds, there are several tools available online to help measure its effect.

The simplest form of quantitative measurement is to count

- number of followers
- number of posts or items uploaded, tweets sent etc.
- number of shares and retweets

More sophisticated information concerning penetration, exposure and audience share is available. The most popular social media feeds incorporate a basic level of information; requesting deeper analysis does tend to cost money. The Service will assess free and charged for tools to measure the impact of digital engagement.

## **8. Conclusion**

The findings of Ofcom's 2012 Market Survey clearly indicate that the UK public's relationship with information, communication and technology has changed rapidly and decisively. Societies continued reliance on and delight in the pattern of ENGAGING, REPORTING and SHARING means that our services cannot and should not exclude audiences engaging with our collections in new ways. In a time when public funders are scrutinising bids for evidence of the greatest return on their investment, social media enables the team to gather evidence and promote projects. This Strategy will enable the Service to focus its resource in the right areas in a co-ordinated and effective manner.

## **9. Action Plan**

### *9.1 Website*

- Timely updates to reflect current service offer (opening hours, events, fees and charges, etc) (ongoing)
- Development of the Local and Community History Guide (2014-15, part 2)
- News updates

### *9.2 Pasttrack website*

- Move site to a new, flexible platform
- Improve purchase facility
- Develop user/volunteer content development
- Host other types of collections e.g. tithe maps
- Develop as hub for local history group content hosting

### 9.3 Online catalogue

- Continue to set cataloguing targets in the Service Plan that use both volunteer and professional skills to maximum effect.

### 9.4 Staffordshire Name Indexes

- Work should continue to grow the online catalogues with volunteer assistance. The next phase of indexes should be planned with careful consideration as to how the indexes will complement each other and attract interest. The targets can be found in the current Service Plan.
- The sites should be promoted in a more robust way, targeting the family history community

### 9.5 Find My Past

- The Service will continue to promote online access focusing on the family history market to drive users to the site.
- Training and familiarisation session will be offered for library staff to widen awareness of the resource.

### 9.6 Facebook

This channel will be used for:

- News updates
- News worthy, of the moment posts
- Engaging images

### 9.7 Twitter

- As with Facebook, but more 'of the moment'. In using both twitter and facebook we should try to be about conversations, not about information management.

### 9.8 Blogging

- This channel will be tested on the Great War website by staff and volunteers to talk about discoveries in the collections.

### 9.9 Resources and performance

- A Digital Engagement team will be formed with champions from across the Service.
- Training a guidelines will be provided to ensure staff work within the policies of its corporate bodies
- Best practice will be highlighted and use of support from the Communications Team to ensure the team are effective and engaging in their use of social media.
- Appropriate performance measures will be introduced to assess how well the Strategy is working.

## 9. Review

This strategy will be reviewed every three years.  
The next review will be 2017.



<b>Local Members Interest</b>
N/A

**Staffordshire and Stoke on Trent Joint Archive Committee - 20 November 2014**

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**Staffordshire and Stoke on Trent Archive Service:  
Heritage Lottery Fund Bid for Staffordshire History Centre**

**Recommendation(s)**

1. That this report updating the Joint Archive Committee on the progress of the project be received.

**Report of Director for Deputy Chief Executive and Director for Place  
(Staffordshire County Council) and Assistant Chief Executive (Stoke on Trent  
City Council)**

**Reasons for Recommendations**

2. The focus of this project is to bring together onto one site Archive Service collections from Lichfield and Stafford alongside those of the William Salt Library to enable the Service to transform the way it operates. This will enable both Services to change the visitor experience, preserve priceless archive material and expand record storage facilities to meet the current and future storage demands and also comply with the required British Standards. It will also enable both services to be delivered more efficiently and ensure the long term sustainability of the Archive offer within Staffordshire.
3. At the Joint Archive Committee on 19 June a report was presented on proposals to relocate the William Salt Collection and Lichfield Record Office Archives to the Staffordshire Record Office site. This report is updating the Committee on the progress of the project since then.

**Background**

4. A stage 1 Heritage Lottery Fund (HLF) bid was submitted in April 2014 seeking funding to extend Staffordshire Record Office to provide new storage and facilities for the collections in Lichfield Record Office and the William Salt Library. Total project costs were £4.3 million with 11% matched funding from the County Council. This included £50,000 from the Archive Service reserve approved by the Joint Archive Committee in November 2013.
5. The bid was rejected by HLF in July 2014 but with resubmission welcomed. Rejection on a first attempt is not unusual and HLF does not always leave the door open for a second submission. Written and verbal feedback on the bid was received as follows:
  - The Board were supportive of the Council's approach to bring the three collections together but felt that the project needed a much better overall vision

to demonstrate how the public could be encouraged to engage with the fantastic collection of archives more clearly.

- They thought that the application did not outline the potential future use of the William Salt Library building and it was considered that this should be further explored as part of the options of scoping the project
- Further consideration needed to be given to public consultation with regard to the potential closure of the archives and William Salt Library Building
- The budget towards activity costs was considered to be relatively low and activities would be delivered in one year which raised concern

Verbally we were told that resubmission would be welcomed and reiterated the strong competition we are up against at this level. It was clear that they understood the quality and significance of the collections and the need to safeguard them however a clearer vision on how people would engage with them was required.

6. The Project Board met in August to discuss the feedback and it was agreed that further work was possible to improve the bid. The Board agreed that employing a consultant with the right skills and expertise was essential and also commissioning a new design through a competition to achieve the following:

- A new the vision for the project and the Service as a whole
- Further stakeholder engagement especially with non-users
- Exploring options for use of the William Salt Library Building
- Developing a strong activity programme
- A new design reflecting the vision for the Service
- Preparation of a second stage 1 bid with the project team

7. A report was submitted to the County Council Strategic Property Board in September requesting £20,000 to enable the appointment of a consultant to work with the Project Team and support further consultation with stake holders and non users. It was estimated that this would be approximately six months work and with a timescale of resubmission of the bid in April or June 2015. The Strategic Property Board approved the funding with specific emphasis on a new vision for the Archive Service to enable it to truly transform its current delivery model to one that attracts a broader range of users accessing the collection in a variety of ways and also provides an affordable and sustainable funding model for the future.

8. A Project Team was formed and has met twice since August. It includes a range of officers and representatives from the Friends of the Staffordshire and Stoke on Trent Archive Service and Friends of the William Salt Library. The meetings have enabled positive conversations to take place between the Trustees, Archive Service and the Friends and a new approach to be developed. Other stakeholders will be invited onto the team to ensure representation of user interests but also attract new supporters to the project.

9. The William Salt Library Trust has led a piece of work to look at future uses of the William Salt Library building. This work is ongoing. A new Project Enquiry has been submitted to HLF and they have responded requesting a meeting with the team. This time the key contact is the Head of HLF West Midlands, a more senior adviser than on the previous bid. The new Project Enquiry has changed the project name



to 'Staffordshire History Centre' establishing a fresh start, approach and development of a more inclusive offer that encourages new ways, means and types of user to access the collections not just for research but for enjoyment. It will focus on seeking partnerships, using volunteers and creating exciting opportunities to showcase these collections as a cultural attraction.

10. On 5 November a consultant, Janice Tullock Associates, was selected to work with the Project Team on a new vision, new approach and new bid. The consultant will start work in November and brings a strong track record from similar projects, understanding of HLF requirements, and an ability to work with a variety of partners and bring them together around a single vision. They have worked on high profile projects such as Archives+ at Manchester Central Library and the new Heritage Quay at Huddersfield University Archives. Their statements about previous experience are at Appendix 2.

## **Conclusion**

11. The rejection of the HLF bid in July was disappointing but not unusual. It has given the Project Team an opportunity to reflect on the feedback and develop a new approach involving stakeholders in the decision making. The allocation of funding to employ a consultant brings additional capacity and creativity to the project. The development of strong vision for a sustainable and resilient Archive Service will ensure benefit regardless of whether HLF funding is secured or not. The focus will still be on attracting investment to save on service delivery costs but the vision will also provide a plan for transforming the Service without HLF funding and delivering a sustainable funding model for the future.

## **Appendix 1**

### **Equalities implications:**

A new vision for the Archive Service will focus on engagement with a wider range of groups and encourage access to the collections.

### **Legal implications:**

The partnership agreement between the Trust and the County Council remains in place for the new bid.

### **Resource and Value for money implications:**

The project will enable savings to be made on building maintenance of approximately £75,000 and also make more efficient use of the existing Staffordshire Record Office site. The Service will also be able to find further savings by running just one public access site rather than three.

### **Risk implications:**

The main risk to the project is that the Heritage Lottery Fund bid may not succeed but the consultant will work with the team to have an alternative plan in place.

**Climate Change implications:**

The project will focus on delivering energy efficient buildings and reducing maintenance costs.

**Health Impact Assessment screening:**

No significant implications.

**Report author:**

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**List of Background Papers**

Nil

## **Appendix 2: Excerpt from Janice Tullock Associates Proposal for Staffordshire History Centre citing previous projects**

### **Introduction to the consultants**

We propose to provide a team of 2 specialists, Janice Tullock and Emma Parsons, to work with Staffordshire Archives to reach a successful application to the Heritage Lottery Fund.

We are an experienced team that regularly work with organisations to design and make applications for Heritage Lottery funded projects. We have a clear understanding of the requirements of the HLF, developed through experience making applications, working with and talking to HLF officers and trustees on a regular basis. Our successfully funded HLF projects include Archives+ (Manchester), Heritage Quay (University of Huddersfield) and the Brotherton Library, University of Leeds, Eden Rivers Trust, Skills for the Future (2 projects), and Montagu Monuments in Northants. We also help organisations to develop their strategic vision and produce forward plans. As a team we offer experience and specialisms in libraries, archives and museums; strategic planning; consultation; audience development; policy and stakeholder analysis; community engagement and consultation; volunteering and training; marketing and communications; formal and informal learning. We have an excellent understanding of the Heritage Lottery Fund between us and have both acted as HLF mentors, monitors and assessors. Our philosophy is to work in partnership with the client and to deliver projects with people AND heritage at their centre. This helps us to deliver projects which meet the HLF outcomes for people, heritage and communities.

We have worked on a number of projects which have brought diverse partners together for the first time. These have often needed to develop a joint vision and shared aims across the partnership. In Manchester the new Archives+ project brought together 5 archive services with very different service levels and expectations. In Huddersfield, the key collections belonged to the Rugby League and to Sound & Music, both of whom needed to be convinced that the project reflected their needs. In each case we have worked with the client and their partners to ensure we are developing a shared vision for the project, spending time with each partner to understand what they want and how we can deliver this.

Both consultants have a background of working with a variety of clients – and colleagues – and have been able to bring people from diverse backgrounds together to form a common bond across their working lives. Both Janice and Emma are regular public speakers, with Janice a regular lecturer, and are able to use their written and oral communication skills to bear to persuade and inspire their audience.

### *About Emma and Janice*

Janice Tullock leads an archive and heritage consultancy which aims to bring archival skills to the non-archival sector and a range of specialist skills to the archival sector. Janice is a registered archivist and former Archives Fellow on the Clore Leadership Programme, and works mainly by providing access to a wide range of skills through a network of associates. Janice has a number of years' experience as a local government archivist and archives manager in archive services across the country including Kent, Buckinghamshire and Merseyside. Moving to the role of Archives Development Officer at Museums, Libraries and Archives Council North West (MLA NW) resulted in her developing an increased knowledge of the sector and skills in policy development and delivery. Janice has worked as an archives and heritage consultant since 2006, with business growing year on year and an increasing amount of repeat business. In 2013 Janice completed a 3 year project to design and write the first UK wide Archive Service Accreditation Standard. She has been an expert advisor to the Heritage Lottery Fund since 2001 and since 2008 has also provided mentoring and monitoring.

Emma Parsons has worked as a full time consultant with arts, heritage and tourism organisations for over 6 years and was previously Head of Marketing & PR at Imperial War Museum North (2001—2007). She brings a record of successful consultancy across the heritage and cultural sectors in community consultation and evaluation, audience development and marketing, business planning, strategic thinking and project management. Emma has been on the national register for HLF as a mentor and monitor for applicants for 4 years and has worked with 6 clients on their successful HLF bids including 3 archive programmes with Janice for Archives+ in Manchester, the University of Huddersfield's Heritage Quay, and the University of Leeds Special Collections Exhibition Centre. Emma worked with Bolton Museums & Library Service in the last year to project manage their stage 2 HLF bid which was submitted in August 2014. She coordinated the bid to ensure it reflected the organisation's priorities, the needs of the communities it would serve, and delivered the HLF objectives.

## **Track Record - Relevant projects and experience**

### *Designing a UK wide Archives Accreditation Scheme*

Archive Service Accreditation is a partnership managed project which Janice managed from scoping, through design, writing, piloting until the scheme was up and running. This has involved gathering the views and bringing together opinions from 9 major partnership organisations<sup>1</sup> and the whole of the archives sector. At the start of the process many of the partners had different viewpoints on whether the

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<sup>1</sup> Partners include the National Archives, Archives and Records Association, Arts Council England, Cymal, Scottish Council on Archives and National Records of Scotland.

project was possible to achieve and how it should be achieved. We used a variety of methods to gather the views of these partners and the archives sector. Through an online co-creation tool we discussed the scheme in detail and using focus groups and seminars we brought together views about the project.

We were able to take on board all the concerns of partners and using the views of the archives sector we were able to design a scheme and write an accreditation standard that meets all the needs of the partners. By involving the archives sector, we were also able to bring the archives sector along with the development of the scheme. The scheme has now been up and running for a year and has become a central part of the archives environment, with support from across the sector.

### *University of Huddersfield Archives*

Heritage @ Huddersfield was bid to the Heritage Lottery Fund by the University of Huddersfield Archives and Special Collections which was successful in 2013. The project aims to secure the long term future of the collections through conservation and cataloguing and to enable the service to explore new ways for users to engage with archives.

Securing the future of the collections will enable staff to develop new and expanded services for users. For users, the project aims to provide:

- New and improved methods of engagement for those interested in the subjects covered.
- An inspiring entry point for those new to the subject and those new to archives.
- Interpretation of the archives and subjects covered.

JT Associates were contracted to research and develop an activity plan which supported HLF's aims of participation and learning. The plan also needed to meet the aspirations of the service for the project and in the future.

JT Associates began by examining the current service and audiences, using our own tools based upon the Archive Service Accreditation and Inspiring Learning for All frameworks. Research was undertaken with potential partners and stakeholders in the area. We worked with the project team and steering group of diverse partners to refine the target audiences for the project. This was followed by detailed consultation with the target audiences, including teachers, students, rugby league fans, users of other archives and contemporary music fans.

Using our experience and knowledge we were then able to take the results of this research and consultation and to use it to design an activity programme for the project. This includes project activity, teaching materials, events, marketing and online activity. We made recommendations which could be delivered by the project

and other which could be delivered by the staff team. Throughout we worked in partnership with the client and consultants undertaking the exhibition design work and conservation management plan.

Outcomes achieved include:

- An activity plan that is value for money, economical and deliverable within the available resources.
- A project that reflected that diverse needs of its partners
- A project that has the audience at its centre and will deliver the intended audience engagement and participation
- A sustainable plan which will thrive beyond the life of the HLF funding

### *Archives+, Manchester*

Archives+ is a new partnership and a new public space which is part of Manchester Central Library and Town Hall Complex Transformation Programme. The project brought together the 5 partners into one space in the new central library in Manchester in the development of a major new exhibition and heritage destination, a programme of public events, community outreach and learning programmes. The project aims to increase access to archives and change the profile archive users by specifically targeting new audiences.

JT Associates were contracted to research and develop an activity plan which supported HLF's aims of participation and learning. We worked closely with the client to get a deep understanding of their needs and ensure that there was ownership of the Activity Plan with key stakeholders. Key ways of working were:

- Ensuring the activities meet audiences' needs:
- Developing activities grounded in best practice:
- Workshops and interviews with each partner to understand their viewpoints and develop a joint ownership of the project from the diverse internal and external stakeholders:
- Strategic development grounded in evidence based research:

Outcomes achieved included:

- An activity plan which is responsive to the needs of audiences
- Target audiences who already feel a connection to the programme
- A ground breaking programme of activities which draws on best practice
- A partnership of 5 archive services which feels ownership of the programme
- A sustainable plan which will thrive beyond the life of the HLF funding
- A successful funding application to HLF for £1.5 million

Janice has returned to the project to evaluate its progress.

### *Eden Rivers Trust*

Emma worked with an associate to develop an Audience Development Plan and Activity Plan for the Eden Rivers Trust, to be submitted at the end of May 2013. The Trust is an environmental charity with little experience of developing audiences or community engagement and the Activity Plan process has included a period of changing perceptions and new ways of working for the project team. The resulting Plan has challenged the team's original thinking behind their project, putting audiences at the heart of their planning, and gained much praise from their HLF Case Officer. The plan included extensive consultation with new audiences, including students, families, hard to reach communities, local groups and teachers.

### *Montagu Monuments, Northamptonshire*

Emma Parsons worked with the Princes Regeneration Trust as their Heritage Access Consultant on a stage 2 HLF application for the Montagu Monuments near Kettering. Her role was to lead on the development of the Activity Plan, including all public and stakeholder consultation, outreach and audience development planning. The Monuments are in a church on the Duke of Buccleuch's estate, and the work involves developing a strong working partnership between church, Estate, local people and potential audiences.

### *Bolton Museum & Library Service*

Emma worked with Bolton's team to develop their HLF bid for a new Egyptology Gallery within the Museum which improved access and interpretation of their collections and offered opportunities for community participation and engagement in its development. Emma project managed the application, bringing in an Interpretation Consultant to work with the Museum staff and designers, and training a member of staff in community consultation techniques to enable a greater programme to be delivered in-house. She coordinated the final submission to ensure a coherent narrative across the different elements of the application and is awaiting the HLF Committee decision in December 2014.





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