

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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