Collections

Service delivery plan   2018 / 2019

SERVICE DELIVERY PLAN 2018/19
HERITAGE AND CULTURE WARWICKSHIRE
WARWICKSHIRE COUNTY RECORD OFFICE

Heritage and Culture Warwickshire Transformation
Heritage and Culture Warwickshire combines Archives, Archaeology Projects, Arts, Museums and Heritage Education services within Warwickshire. The services were restructured in 2012 to help meet a cut in the combined budgets of £413k. Further cuts removed a further £478k from the budget of Heritage and Culture Warwickshire in 2017. Reductions included the closure of St John's House to the public and reduced opening hours for the Record Office as of 13th March 2017. Reductions of £180k this financial year have prompted a management restructure: Operations and Development and Collections reporting to Stuart Ikeringill, Heritage and Environment Manager.

Overview of the service
Warwickshire County Record Office (WCRO) is based in Priory Park, Warwick, where its purpose-built premises provide safe and controlled accommodation for over 3 miles of archives. The record office was extended in 2003 and now provides services and facilities for up to 80 visitors per day. WCRO's archive collections date back to the 12th century and contain information about all aspects of life and work in Warwickshire. The collections include parish and non-conformist records, records of local courts, hospitals and schools, records of local families and estates, local businesses (including solicitors) as well as those of local community groups and private individuals.

The management of the County Record Office is overseen by Sam Collenette and the Management Team comprising: Robert Eyre, Senior Archivist; Donata Santorini, Senior Conservator;

Staffing and Statistics
WCRO currently employs 9.5 FTE comprising archivists, a conservator, an office manager, a compliance manager and a public service team of records, archives and conservation assistants including an annual trainee post. Part-time scanning assistant posts were created as positive action traineeships in 2014. The service is also supported by a team of 57 volunteers. Our volunteers contributed more than 4662 hours last year developing indexes and improving access to the collections for the public as well as supporting Priory Books.

Achievements
The greatest achievement in 2017-18 has been the ratification of the office's accredited status and the ongoing success of the Heritage Lottery Funded Our Warwickshire project with website views and contributions to the community history website tripling in the first three months of 2018. The service's first closure weeks enabled the team to complete 39 accessions, add 198 catalogue entries to Warwickshire's Past Unlocked and repackage 25 collections in archival quality materials. In addition 80 bundles of maps were processed and added to 10 map tanks for public use. Careful monitoring of air conditioning usage whilst maintaining environmental conditions led to a year on year saving of £20k and a reduction in from 208 tonnes of carbon in 2015 to 75 tonnes in 2017. WCRO provided images and original documents for exhibitions in London at the Postal Museum and for local events at St Mary's Church, Warwick as part of the James I festival. The Conservation team have been nominated for a Warwickshire STAR award as a result of these achievements. The HLF funded Healey project developed a new catalogue, talk and STEM workshop for schools. All of these are proving popular. Finally, investment in digital preservation has led to the breakthrough adoption of

Archivematica and Atom and training and procedures will be rolled out to staff this coming year. Adoption of Archivematica will allow WCRO to meet all the criteria in level 2 of the National Digital Stewardship Alliance - Levels of Digital Preservation (NDSA) and achieve 5 out of the remaining 10 criteria for levels 3 and 4.

WCRO welcomed 4271 visitors, produced 7899 documents and answered 1775 enquiries in 2017-18. The number of people visiting the searchroom in person and enquiries to the service has slightly reduced this year following the reduction in opening hours. On-line services such as parish records, quarter sessions, catalogues and photograph collections however, have nearly doubled attracting over 3.5 million web page views last year. This increase is largely due to a new partnership with Find My Past and the success of the Our Warwickshire website. Whilst the majority of in-person visitors are from the Warwickshire area, the services are also used and valued by people all over the world. This interest is being met by delivering further online services through the community history website, 'Our Warwickshire' and increased digitisation. This year Warwickshire County Council have funded Heritage and Culture Warwickshire to deliver Warwickshire Bytes, a digital heritage festival celebrating the work of 50 new volunteers. Digitisation efforts will focus on Warwickshire after World War One aiming to create 12,000 newly digitised images.

Service Priorities 2016-2021
This section of the service plan was refreshed at a planning session held with WCRO staff in February 2016

These priorities guide the longer term direction of the service.

	Social Focus	**Economic Focus**	**Environment Focus**
Service Priorities: Internal	**Quality:** Collections, Public Service, Partnerships, Learning, Volunteers, Conservation	**Communication:** Fundraising, Profile, Advocacy, Managing Customer Expectations	**Digital Services:** Online Shop, Digital Preservation Strategy, Ancestry and Find My Past
Service Priorities: External	**Health:** Volunteering opportunities Mental Health and Wellbeing	**Skills:** Positive Action Placements Digital Exclusion	**Community Identity:** Warwickshire Bytes Project Our Warwickshire
Medium Term (2-5 years)	Develop CRO contribution to social capital through services for community and educational use	Develop diverse income streams Deliver STEM activities	Develop 'Our Warwickshire' and other social media activities Regional digital preservation solution
Long Term (5 years)	Facilitate online information and advice services e.g. advance ordering through Calm; charged for online access to collections	Investigate partnership schemes with universities Investigate European funding for cataloguing projects	Make clear link between original and online use Improve sustainability and develop use of Priory Park site

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Warwickshire County Council's Core Purpose is:

We want to make Warwickshire the best it can be

Our outcomes are
Our communities and individuals are supported to be safe, healthy and independent
- Our communities are independent, resilient and safe
- Vulnerable members of our communities are supported to be independent and safe
- We support and coordinate other organisations to deliver services

Warwickshire's economy is vibrant and supported by the right jobs, training, skills and infrastructure
- Children and families have access to quality learning throughout their lives
- Young people are supported to access apprenticeships and employment
- Warwickshire is an attractive place to do business with a strong local economy and infrastructure
- Our communities and businesses are thriving and prosperous

WCRO contributes to the Council's Information Strategy providing ***The Information you need, at any time, accessible from anywhere.*** And to the Council's £2.5 million Digital Transformation Programme

Warwickshire County Council like all public authorities has to make cuts to public services. This service plan has been drawn up based on our current staffing and budget levels. Should these change then the capacity of the team to deliver the service plan will be affected.

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Statutory responsibilities

Public Records Acts 1958 and 1967
Local Government (Records) Act 1962
Local Government Act 1972 (ss 224-229)
Parochial Registers and Records Measure 1978 (amended 1992)
Freedom of Information Act 2000
Environmental Information Regulations 2004
Data Protection Act 2018 and General Data Protection Regulation
Constitutional Reform and Governance Act 2010

Warwickshire County Record Office is an accredited service and is appointed as a place of deposit for public records outside The National Archives. WCRO is recognised by the National Archives: Historic Manuscripts Commission as meeting the *Standard for Record Repositories,* and by the Master of the Rolls as a repository for manorial and tithe documents under the provision of section 144A (7) of the Law of Property Act 1922, section 36(2) of the Tithe Act 1936, and section 7 (1) of the Local Government (Records) Act 1962.

WCRO has been designated by the Bishop of the Diocese of Birmingham as diocesan record office for those Anglican parishes lying within the Diocese of Birmingham (but not the city of Birmingham parishes), the County of Warwickshire and the Metropolitan Borough of Solihull. WCRO has been designated by the Bishop of the Diocese of Coventry as diocesan record office for the Anglican parishes lying within the Diocese of Coventry and the County of Warwickshire. WCRO acts as official place of deposit for those Anglican parishes which fall within the Diocese of Gloucester and the County of Warwickshire by arrangement with the Diocese of Gloucester and Gloucestershire Record Office.

WCRO achieved Archive Service Accreditation in March 2015 and successfully retained it in July 2017. The Accreditation Panel "…*noted that the review application showed as anticipated some significant service reductions, but that it also highlighted the strength and coherence of the service's response to budget cuts. There were some very positive steps around forward planning, a digital archivist post and partnership working, which showed the service was still able to be proactive and creative in its approaches*."

Partners
WCRO works in partnership with the Friends of Warwickshire County Record Office, a registered charity whose aims are to support the work of the County Record Office and to promote the education of the public through the use of historical records. Users' views on the service are sought both through an official users' forum and by regular surveys. WCRO also works closely with local record creating bodies and local and family history societies to ensure the survival of records of archival significance and to promote awareness of and support for the importance of

Warwickshire's archival heritage. WCRO is a partner in Archives West Midlands, a strategic partnership, which brings together depositors, owners, users, friends and heads of archive services to provide a strategic lead to archive development. WCRO are working closely with Warwickshire Local History Society, Nuneaton and Bedworth Heritage Forum, WEST (Warwickshire's Employment Support Service), World War One volunteers, Nuneaton's History Hub Ltd, Midland Ancestor and Warwickshire Industrial Archaeology Society on a variety of cataloguing, digitisation and indexing projects.

Mission statement and key objectives

To safeguard, manage and develop Warwickshire's archives so they can be accessed, interpreted and enjoyed by all

and in so doing, makes an important contribution to key corporate priority areas by:
· providing public access to records both in their original form and facilitating their use through on-site and indirect access to trained and qualified staff, finding aids and information resources.
· encouraging and making provision for educational use of the services' collections and expertise, raising educational attainment levels amongst younger people and promoting the contribution of archives to lifelong learning.
· raising awareness of the importance of archives in developing a sense of place and self for communities and individuals, thereby enriching people's lives.

Contents
The plan has been divided into service areas to make it easy to use:

Administration	Public Service: Searchroom and Online Services
Collections and Cataloguing	Special Projects
Compliance	Volunteers
Conservation	

Sam Collenette, Collections Manager 2018-19

Area of activity		Lead Management Team Officer	
Administration		Sam Collenette, Collections Manager (SC)	
Reference Code	**Headline Actions**	**Performance Indicators / Key Outcomes / Measures of Success**	**Lead Officer**
CRO 1/1	Develop the business case for HCW to meet the requirements of the transformation programme Doing Things Better	Collate information and evidence Prioritise and plan approach Provide updates to staff and stakeholders	Heritage and Culture Warwickshire Management Team (HCWMT)/CROMT
CRO 1/2	Maintain accreditation status for Archives and compliance with regulatory frameworks	Meet BS4971:2017 (replacement for PD5454), standards for record repositories and retain place of deposit & diocesan status Implement improvement requirements to maintain Accreditation standards.	CROMT
CRO 1/3	Achieve Business Transformation	Support Business Development Group to deliver diversified income projects Monitor impact of reduced hours through visitor numbers, income and document production. Income targets: Services and Contracts: £50,000	CROMT, Business Development Group SC/RME AD
CRO 1/4	Maintain building fabric, equipment, manage office administration	Oversee contractors, forecast budgets, administer invoices and orders	MA, AD, RN
CRO 1/5	Engage with service users and partners to inform service planning and development	Two User Forum meetings held User survey results shared and promoted Participation in PSQG survey for remote enquiries Archives West Midlands supported Friends events supported Facebook and Twitter accounts maintained	RME SC/RME
CRO1/6	Complete Shire Hall deeds project	Agree on final accession	RN/DS/SC

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Area of activity	Lead Management Team Officer	
Collections – (including CALM, retro-conversion work, cataloguing, digital preservation and partnership projects)	Robert Eyre, Senior Archivist (RME);	

Code	Headline Actions	Performance Indicators / Key Outcomes / Measures of Success	Lead Officer
CRO 2/1	Maintain cataloguing levels and manage closure weeks · Process accessions and maintain collections development activity	Distribute cataloguing tasks according to the prioritisation system Plan for 2 week closure in winter 2018 and report on results	ALW ALW
CRO 2/2	Manage strongrooms effectively	Oversee transfer of public records e.g. courts, hospitals and coroners on new basis with burdens funding from The National Archives.	ALW
CRO 2/3	Retro-conversion of manual finding-aids for public catalogues · Access2Archives collections · Reports and consultations added	60 staff hours spent on retro-conversion 2 additional collections available via Warlock	HP/DH
CRO2/4	Maintain and develop CALM to deliver the best access to collections for staff and public	PSQG survey 2016 usability had risen to 87% and quality to 86%, we will continue to monitor satisfaction ratings from user survey. Provide 2 training sessions for users Target of 5000 records added to CALM	Archivists Public Service
CRO2/5	Deliver a usable process to make progress against digital preservation challenges	Launch Archivematica and develop access routines for digital records with rollout to all staff Meet criteria level 2 of the National Digital Stewardship Alliance - Levels of Digital Preservation (NDSA) Support a digital preservation pilot for AWM	DH DH SC/DH/ICT

Area of activity	Lead Management Team Officer	
Compliance (including Freedom of Information (FOI), Data Protection (DP), Copyright, Data Licensing)	Samantha Ryan, HCW Compliance Manager	
Reference Code	**Headline Actions**	**Performance Indicators / Key Outcomes / Measures of Success**	**Lead Officer**
CRO 3/1	Oversee implementation of 20 year rule for public records	Agreement in principle within WCC Negotiations with public bodies to establish SLA Implementation of process	SC/SR
CRO 3/2	Access to Information:	Work with Information Security team to ensure co-ordination with corporate process Consider impact of GDPR and work with teams to ensure compliance Deliver Informed Consent project with looked after children	SR SR SR
CRO 3/3	Provide advice and guidance to HCS teams and co-ordinate response to compliance enquiries from the public	Provide 50 HCW usable images via Our Warwickshire Answer 200 FOI, DPA, EIR, ISR & copyright enqs License 250 images for use Income Target of £30000 per year for contracts	SR SR SR SC
CRO 3/4	Consider income strategies for HCS and contribute to development of commercial partnerships	Support Business Development process Oversee transfers to Bridgeman of 10 images per quarter	RME/ SC RSP/SR
CRO 3/5	Consider impact of reduction in role to 0.5FTE	Monitor work levels and make provision for additional support	HCWMT

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Area of activity		
	Lead Management Team Officer	
Conservation – (including preservation, active conservation, strongroom environmental monitoring, delivery of Reprographics service)	Donata Santorini, Senior Conservator (DS)	
Reference Code	**Headline Actions**	**Performance Indicators / Key Outcomes / Measures of Success**	**Lead Officer**
CRO 4/1	Maintain professional level of collection care and professional advice.	Conservation support maintained with 100% of priority 1 met Create end of year report for public with details of work achieved	DS and RSP
CRO 4/2	**Conservation priorities:** Oversee Strongroom conditions Support exhibitions of original documents Involvement in Market Hall and other institution's exhibitions Repackaging of priority collections Support external exhibition requests	Monitor equipment and impact of energy reductions Documents exhibited Total repacked items Numbers of preservation requests completed Conservation work complete	DS DS DS DS/RSP DS/RSP
CRO 4/3	**Preservation priorities:** Meet accreditation improvement requirements Supporting public service delivery Update disaster plan Maintain BS4971:2017 in repository areas Strongroom Cleaning	Daily monitoring of strongroom conditions and prompt action if required Record kept of visits by Dodds contractors Recalibration of Hanwell and Thermohygrometers Oversee parameter setting for new system Organise brief and contract cleaners	RSP/DS/SC DS DS DS DS/AD
CRO 4/4	**Surrogacy priorities:** Ad hoc surrogates to support HCW and Heritage Education activities	30 hours of outreach work supported e.g. producing surrogates and running courses	RSP/DS
CRO 4/5	**Reprographics priorities:** Promote digital orders Digitise images for licensing	Target of 50 orders completed 10 hours per quarter to digitise images for transfer to Bridgeman Support digitisation projects	RSP RSP RSP

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Area of activity		Lead Management Team Officer	
Public Service – (including WCRO searchroom services, access to CRO primary and secondary sources and CRO volunteers)		Robert Eyre, Senior Archivist	
Reference Code	**Headline Actions**	**Performance Indicators / Key Outcomes / Measures of Success**	**Lead Officer**
CRO 5/1	Provide a good quality service for users within the resources available	Maintain free searchroom opening to public at 21 hours per week 4000 visitors p.a. make use of record office facilities 3 million uses p.a. of online CRO information Maintain Customer Satisfaction rating at 90% Conduct PSQG survey	RME
CRO 5/2	Support Volunteer activities to improve access to collections	3 volunteer projects supported 3000 Volunteer Hours achieved	RME/RM
CRO 5/3	Develop and maintain HCW website	Add new content relating to projects and achievements Highlight links to catalogue and create guides for visitors to redirect popular enquiries	CE AAs
CRO 5/4	Public Service Team support cataloguing projects	3 cataloguing projects achieved	RME/KM Public Service
CRO 5/5	Increase visitors to services and monitor impact through surveys and analysis	Collect statistical data, establish benchmark and maintain overall visitor figures Support HCW delivery of Show and Tell events	RME/Public Service Team/LACE All staff
CRO 5/6	Improve visitor access to searchroom and online resources	Promote new resources such as digital datasets, library and websites to visitors and implement procedures for searchroom delivery Deliver document of the month exhibition Improve visitors awareness of searchroom procedures and current projects through excellent customer service Promote HCW volunteer opportunities, venue hire and make the case for support highlighting the donations box and shop stock	Archivists/Public Service Team AAs Public Service Team Public Service Team

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Area of activity		Lead Management Team Officer	
Special Projects		Sam Collenette, Collections Manager	
Reference Code	**Headline Actions**	**Performance Indicators / Key Outcomes / Measures of Success**	**Lead Officer**
CRO 6/1	Deliver the Our Warwickshire project	Support the OW web editor and editorial team to meet targets and develop the site Support outreach and engagement activity and exhibition programme	All RME/DS/All
CRO 6/2	Develop the Warwickshire Ark project	Research and collaborate with HCW and partners to increase strongroom and classroom capacity Consider use of B20 or other storage/education facilities for interim use	HCWMT/ CROMT/All DS
CRO 6/3	Develop bids to meet priorities via externally funded cataloguing/digitisation projects	Wellcome Trust coalmining bid with Derbyshire CRO Investigate Paul Mellon funding for building plan digitisation	CROMT SC
CRO 6/4	Develop capacity for external contracts and extend online use contracts	Develop partnerships with commercial companies and digitisation of new resources	CROMT/RSP
CRO 6/5	Work together across HCW and WCC	Develop digital asset management streams	SC/DS
CRO 6/6	Develop partnership with Coventry and Warwickshire Mental Health Trust	Work with LACE and CEL on Hatton projects	RME/SR
CRO6/7	Support local, national and regional professional activities	Archives West Midlands,Digital Preservation and Windows on Warwickshire Consortium	SC, DH SC/RSP
CRO6/8	Support projects to transcribe Warwickshire's Civil War Loss accounts	Contribute to transcription project, support volunteers through training, host database of transcripts on HCW website, attend project meetings	RME/DH/SF/RM
CRO6/9	Partnership for Warwick University History Department in the development of a new module on public history	Trial to run in 2019 - offer suitable student placements at HCW locations, measure impact	RME

Area of activity		Lead Management Team Officer	
Volunteering		Sarah Hann, HCW Volunteer Co-ordinator	
Reference Code	**Headline Actions**	**Performance Indicators / Key Outcomes / Measures of Success**	**Lead Officer**
CRO 7/1	Deliver the Warwickshire Bytes project	Investigate methods to facilitate online and remote volunteering	DH
		Recruit and support the project administration and volunteer co-ordinator apprentice	SH
		Recruit and support 50 online volunteers	VC Apprentice
		Digitise 12000 items	
		Deliver 8 Our Warwickshire workshops on priority social housing estates	Digitisation Team BE
		Consult with creative industries to develop a digital heritage festival for Warwickshire	SC
CRO 7/2	Support and celebrate existing volunteers and organise social and training events	Volunteer retention is maximised. Aim to recruit 10 new volunteers. Projects are submitted for awards as appropriate	SH/RM SH SH
CRO 7/3	Recruit and induct new volunteers liaising with colleagues across HCW	Manage volunteer enquiries and recruit efficiently Develop three new roles (The Challenge - 12 young people 15-17 NCS Museum takeover, Warks Bytes and summer volunteering weeks)	SH
CRO 7/4	Facilitate and manage work experience placements on behalf of HCW	4-6 placements across HCW per year	SH
CRO 7/5	Maintain contact and awareness of WCC corporate activity regarding volunteers and contribute to raise awareness of HCW's success in this area.	Membership of the WCC Volunteer Co-ordinator and Managers group. HCW volunteer projects included in corporate events eg Volunteer week	SH
CRO7/6	Maintain contact with local and heritage volunteer sector	Membership of Warwickshire Volunteering Forum and West Mids Volunteering Forum	SH