

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

**PLEASE NOTE  
TIME OF MEETING**

Thursday 12 November 2020

**4.00 pm**

Virtual/on-line at <https://staffordshire.public-i.tv/core/portal/home>

**NB.** Members are requested to join the Teams meeting through the Outlook calendar booking (click "Join Microsoft Teams Meeting").

Also, please ensure your Laptops/Tablets are fully charged prior to the commencement of the meeting.

John Tradewell  
Director of Corporate Services  
4 November 2020

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**A G E N D A**

1. **Appointment of Chairman and Vice-Chairman**
2. **Apologies**
3. **Declarations of Interest in accordance with Standing Order 16**
4. **Minutes of the meeting held on 23 June 2020** (Pages 1 - 6)
5. **Predicted Outturn 2020/21** (Pages 7 - 16)

Joint report of the Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council)

6. **Review of Fees and Charges** (Pages 17 - 24)

Joint report of the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council)

7. **Staffordshire History Centre Project - Update** (Pages 25 - 30)

Joint report of the Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council)

8. **Date of next meeting - 25 February 2021 at 10.30 am, 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**

10. **Archives and Heritage Service Restructure - Update** (Pages 31 - 34)

(exemption paragraphs 2 and 3)

Exempt joint report of the Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council)

11. **Relocation of Stoke-on-Trent City Archives - Update**

(exemption paragraphs 2 and 3)

Exempt joint oral report of the Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council)

<b>Membership</b>	
Gill Burnett	Victoria Wilson
Lorraine Beardmore	

## **Minutes of the Staffordshire and Stoke-on-Trent Joint Archives Committee meeting held on 23 June 2020**

Present: Mike Davies (Invitee/Observer), Gill Heath (Chairman), Gill Burnett and Lorraine Beardmore

### **PART ONE**

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

There were no Declarations of Interest made.

#### **29. Minutes of the meeting held on 6 February 2020**

**RESOLVED** – That the minutes of the meeting held on 6 February 2020 be confirmed and signed by the Chairman.

#### **30. Joint Archives Service: Annual Report 2019/20**

The Committee considered a joint report of the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council) giving details of the Staffordshire and Stoke-on-Trent Archives Service: Annual Report 2019/20 (schedule 1 to the signed minutes) which had been produced in accordance with the Joint Agreement between the two Authorities.

The Annual report provided an account and review of the work and performance of the Staffordshire and Stoke-on-Trent Archive Service for the financial year 1 April 2019 to 31 March 2020.

This was the second year of the new three-year planning cycle. Notable achievements towards meeting the strategic objectives in the current Forward Plan 2018-2021 included:- (i) launch of the Staffordshire Tithe Maps online; (ii) delivery of the touring exhibition 'On Your Doorstep' taking collections across Staffordshire; (iii) securing a Round 1 pass from National Heritage Lottery Fund (NHLF) for the revised Staffordshire History Centre project; (iv) continuing to deliver the Asylum and Bawdy Courts projects and; (v) working with a large number of volunteers to deliver projects, cataloguing and indexing of collections.

In addition, the need to close the onsite public service and enable staff to work from home during the 2020 Covid-19 pandemic had been completely unexpected. However, their willingness to support the Authorities' response and ability to adapt to the on-going situation was noted.

The Archive and Heritage Service collected detailed statistics about all areas of its work covering personal, distance and online use of the service. The five indicators used to measure performance included:- (i) Use of the Service; (ii) Attendances at Events, Talks, Education and Community Visits; (iii) Volunteer Hours; (iv) Customer Satisfaction

and (v) Collecting Activity. Members noted that personal use had declined by 5% when adjusted to take account of the Covid-19 lockdown restrictions. This mirrored a national trend across all Local Authority Archive Services. In addition, some of the Staffordshire websites had seen a dip in activity which was partly attributed to a change in the method of data collection. However, overall, the use of the on-line services had increased by 16% following the high number of hits on the Find My Past webpage.

Attendances at events had been much lower compared to the previous year owing to the absence of external funding. Similarly volunteer hours were down by 9% owing to the suspension of the service during the pandemic. However, Members were pleased to note that customer satisfaction, as measured by the National Distance User Service, for the enquiry service and advance information was high at 96% although no overall customer satisfaction rating was available.

Overall, the service had made good progress against its 10-year vision.

Members noted that the Risk Register had been reviewed and updated in accordance with the recommendations of the Internal Audit inspection undertaken in May 2018. The highest risk rating score (4 out of a possible 9) related to loss or damage of collections and the majority of changes were as a result of the 2020 Covid-19 pandemic. The Directors highlighted that Risk No. 14 – “Impact of a pandemic on service delivery”, (previously Risk No. 13) had been updated in light of the 2020 Covid-19 pandemic including appropriate mitigation measures.

**RESOLVED** – (i) That the report be received and noted.

(ii) That the revised Risk Register for the Staffordshire and Stoke-on-Trent Joint Archive Service be approved.

### **31. 2019/20 Final Outturn and Predicted Outturn 2020/21**

The Committee considered a joint report of the Director of Corporate Services and City Director of Housing and Community Services setting out (i) the final net revenue outturn for the Joint Archive Service for 2019/20 and (ii) the predicted outturn for 2020/21 (schedule 2 to the signed minutes).

Members noted that the final net revenue outturn was £809,000 compared to an approved budget of £634,000 which gave an overspend of £175,000 owing to. This had been as a result of a delay in the delivery of savings from a planned re-organisation of the Archives and Heritage Service and had been absorbed within the Council’s outturn positions rather than the level of Service reserves.

The balance in the General Reserve was £303,000 whereas the balance in the Archive Acquisition Reserve was £57,000 and Art Fund Grant (Minton), £10,000.

With regard to 2020/21, the net spend to date was £126,000 ie approximately 10% of the current Revenue Budget (£655,000). The latest forecast was for an overall overspend of £129,000 at the year’s end owing to continued delays in the delivery of savings from the planned re-organisation of the service which would be slightly offset by a small underspend of £20,000 in the Stoke-on-Trent Sites and Public Services budget

heading. Members noted that in the event the anticipated overspend materialised, the balance would be funded by Staffordshire County Council.

With regard to Reserves it was anticipated there would be a total balance of £350,000 ie approximately £20,000 less than the current position owing to (i) spend on air conditioning works at the City Council's premises (£30,000); (ii) full use of the Art Fund Grant (£10,000) and; (iii) transfer of the above-mentioned underspend (£20,000).

In presenting the report, The Director of Housing and Community Services informed Members that the City Council's review of Service accommodation was on-going and undertook to notify the Committee of their proposals once these had emerged. Therefore, budgeted expenditure on new air conditioning equipment for existing premises would be deferred until such time as plans had been finalised.

**RESOLVED** – (a) That the report be received and noted.

(b) That the Final Net Revenue Outturn position for 2019/20 be noted.

(c) That net revenue budget position for 2020/21 be noted.

### **32. Staffordshire History Centre Project - Update**

The Committee considered a report (Schedule 3 to the signed minutes) by the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council) updating them on progress with regard to the Staffordshire History Centre (SHC) Project.

Permission to commence work on the project was granted by the National Lottery Heritage Fund (NLHF) on 17 December 2019. Since that time, a review of the work programme had been undertaken in response to the 2020 Covid-19 pandemic. Proposed changes had subsequently been discussed with the National Lottery Fund (NHLF) who had extended their deadline for submission of Round 2 Applications.

Audience Agency, the consultants who had been appointed to undertake (i) audience research and (ii) develop a marketing strategy for the History Centre had commenced in February 2020. However, following the outbreak, the company had implemented a furlough system for staff which had delayed progress. Therefore, the timetable for completion of the two pieces of work had been extended until the end of July 2020. To date, the company had completed an initial report using data/responses from 776 users which would be used to inform the Business Plan, Activity Plan and Market Strategy. In addition, they had launched an online survey on 20 May 2020 which had elicited 302 responses by 5 June 2020. Doorstep interviews would also be undertaken (subject to social distancing rules) in June 2020 in Abbots Bromley.

With regard to the 'Learning' element of the project, the contract timetable had been extended to 31 July 2020. Alternative methods of working with volunteers had been investigated and a private Facebook group established. However, owing to this channel not being universally liked an online Learning Blog was launched to include updated content throughout each week. In addition, Robin Johnson, Consultant had made

significant progress in establishing partnerships with schools via Entrust Education. An online survey had been sent to schools in the Stafford area with over 50% free school meal and/or English as a Secondary or Foreign Language ratios and feedback to date from those 30 schools which had responded had been overwhelmingly positive. The full results of the survey would be included in the Learning Plan.

Also in support of the Learning element, seven virtual learning sessions had been written with the following themes of (i) Mystery Staffordshire Objects; (ii) Staffordshire Timeline; (iii) Staffordshire Portraits; (iv) Victorian Stafford Gaol; (v) Discover Your Local Area; (vi) Design Your Own Manuscript and (vii) Create Your Own Coat of Arms together with a children's digital evaluation exercise which aimed to generate basic feedback from pupils.

With regard to the 'Conservation' element of the project, a review of the Conservation Management Plan (CMP) for buildings had resulted in five minor amendments being made. The CMP for collections had also recently been completed by the Consultant and was currently being reviewed by the Core Project Team. Both Plans would be completed by the end of June 2020.

With regard to the Design and Implementation element of the project, the Project Team had remained in close contact with the Pringle, Richard, Sharratt Architects who undertook the original design work. A review of their initial work was to be undertaken to incorporate changes necessary arising from the audience research and Activity and Interpretation Plans. In addition, new work had been commissioned to create a habitat for pollinators and wildlife.

The Project Team had also discussed a review of the Implementation Plan to take account of Covid-19, with Imagemakers. The review was to commence following completion of the audience research work and would help to ensure spaces within the Centre were future proofed in the event restrictions remained were in place when the building opened.

Initial work had begun in the Business Plan which would be completed following evaluation of the audience research data, surveys and work on the Activity Plan.

Members noted the following revised key dates for the Project:-

- Presentation of Audience Research to SHC Board by Audience Agency – 22 July 2020;
- Draft Reports review by SHC Project Board – August 2020;
- Mid-Stage Review – Late September 2020;
- Submission of Round 2 Application (assuming sufficient progress made) – 23 November 2020.

With regard to the establishment of a Development Trust, it was hoped that approval from the Two Authorities would be obtained no later than July 2020.

During the discussion which ensued, Members paid tribute to the work of the Directors in maintaining momentum in the Project during the 2020 Covid-19 Pandemic. They also stressed the importance of volunteers in ensuring its success and hoped that

engagement could be sustained during the period that lockdown/social distancing restrictions were in place. In response, the Directors said whilst they hoped some face to face contact could be re-instated by September 2020, volunteers would continue to be actively involved remotely/on-line.

**RESOLVED** – That the report be received and noted.

### **33. Joint Archives Service: Impact of Covid-19**

The Committee considered a report (Schedule 4 to the signed minutes) by the Deputy Chief Executive and Director of Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke-on-Trent City Council) regarding the impact of the 2020 Covid-19 Pandemic on the Staffordshire and Stoke-on-Trent Archive Service.

The introduction of the social distancing measures and the lockdown from late March 2020 had had a profound impact (positive and negative) on the service. Whilst face to face contact with the public had ceased, services had been adapted to maintain access where possible. Staff had continued to work from home and online engagement had dramatically increased providing the potential for sustained development in this area, in the future. However, there had been an estimated 50% reduction in income arising from a lack of visitors, the planned re-structure of the service had been postponed and volunteer numbers were expected to decline.

It was anticipated that cohorts of staff would return to Staffordshire Record Office, William Salt Library and County Museum from 15 June 2020 (depending on risk assessments being completed and implementation of appropriate social distancing measures. This would enable improved remote access to eg photocopying, research and digital photography services. From Mid-July it was hoped that an appointments only/restricted service could be re-introduced in the Reading Room although outreach, talks and engagement activities would continue on-line only for the foreseeable future. In addition, onsite volunteering opportunities would continue to be unavailable. However, free access to Staffordshire content on Find My Past website had been negotiated for volunteers to support research projects.

**RESOLVED** – That the report be received and noted.

### **34. Date of next meeting - Thursday 12 November 2020 at 10.30 am, venue to be confirmed**

**RESOLVED** – That the date and time of the next meeting be noted.

### **35. Exclusion of the public**

**RESOLVED** – That the public be excluded for the following items of business which involved 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”.

**36. Exempt minutes of meeting held on 6 February 2020**

(exemption paragraph 2 and 3)

**RESOLVED** – That the exempt minutes of the meeting held on 6 February 2020 be confirmed and signed by the Chairman

**Chairman**



Local Member Interest	Nil
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**STAFFORDSHIRE AND STOKE ON TRENT JOINT ARCHIVES COMMITTEE**

**12<sup>th</sup> November 2020**

**JOINT ARCHIVE SERVICE – PREDICTED OUTTURN 2020/21**

**Recommendation(s)**

1. That the report updates the Joint Archive Committee on the current 2020/21 net budget position.
2. That the Joint Committee approves the use of £0.251m from the General Reserve as match funding for the Staffordshire History Centre project.

**Joint report of the Director of Corporate Services and the Director of Families and Communities Services**

**Reasons for Recommendations**

3. The Joint Archive Service net revenue outturn is currently estimated as a £0.174m overspend in the 2020/21 financial year.
4. The partnership continues to hold significant reserves totalling £0.370m. This includes:
  - a. The General Reserve currently holds a balance of £0.303m
  - b. The Archive Acquisition Reserve remains unchanged with a balance of £0.057m.
  - c. A specific reserve of £0.010m for Art Fund grant (Minton)

**Predicted Net Revenue Outturn 2020/21**

5. The detail of the 2020/21 net revenue outturn for the Joint Archive Committee can be found as *Appendix 2* to this report.
6. To date, the Joint Archives net spend is currently £0.345m, 56% of the current net revenue budget of £0.614m. Latest forecast is for an overall overspend of £0.174m this year as follows:
  - a. Core services; £0.073m overspend, largely a result of delayed delivery of savings through the planned reorganisation of the archives and heritage service

- b. Staffordshire County Council sites and public services; £0.101m overspend, largely a result of delayed delivery of savings through the planned reorganisation of the archives and heritage service
- c. Stoke-on-Trent sites and public services; a small underspend of £0.037m is assumed will be transferred to reserves at year end to provide, overall, for a breakeven budget

If this overspend is realised at financial year end, the balance will be covered by Staffordshire County Council.

## **Reserves**

- 7. The current balances on Reserves are set out in *Appendix 3*.
- 8. It is currently forecast that the remaining reserves at the end of 2020/21 available for use will be c £0.378m, around £0.003m less than the current balance. This assumes in 2020/21:
  - a. Net transfer into reserve of the Stoke-on-Trent underspend; £0.037m
  - b. Completion of air conditioning works at Stoke-on Trent; (£0.030m)
  - c. full use of the Art Fund Grant – Minton; (£0.010m)
- 9. It is anticipated that (£0.251m) of the remaining reserve balance as at the end of March 2021 will be used during 2021/22 to contribute towards:
  - a. The capital investment of the Staffordshire Heritage Centre National Lottery Heritage Fund bid.

### **Equalities implications:**

No significant implications.

### **Legal implications:**

The Joint Archive Agreement budget is subject to an Internal Audit, on an ad hoc basis, following the cessation of the annual Small Bodies Audit return.

### **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:**

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**List of Background Papers**

Joint Archives Budget File.

Joint Archives Reserves File.



**Joint Archives Service  
Predicted Outturn Position 2020-2021**

	Core Services			Staffordshire County Council Sites and Public Services			Stoke-on-Trent City Council Sites and Public Services			Total for Service		
	Current Budget	Actual Expenditure @ Oct-2020	Predicted Outturn	Current Budget	Actual Expenditure @ Oct-2020	Predicted Outturn	Current Budget	Actual Expenditure @ Oct-2020	Predicted Outturn	Current Budget	Actual Expenditure @ Oct-2020	Predicted Outturn
	£	£	£	£	£	£	£	£	£	£	£	£
<b>Expenditure</b>												
Employees	261,670	162,589	334,748	194,290	138,731	282,438	141,600	44,165	103,500	597,560	345,485	720,686
Training	240	0	120	0	0	0	900	0	900	1,140	0	1,020
Transport	820	107	350	100	183	150	300	0	300	1,220	290	800
Supplies & Services	4,520	814	4,391	18,150	7,093	17,131	19,200	414	19,200	41,870	8,322	40,722
Transfer to/(From) Reserves	0	0	(900)	0	0	0	0	0	38,100	0	0	37,200
<b>Total Expenditure</b>	<b>267,250</b>	<b>163,511</b>	<b>338,709</b>	<b>212,540</b>	<b>146,007</b>	<b>299,719</b>	<b>162,000</b>	<b>44,579</b>	<b>162,000</b>	<b>641,790</b>	<b>354,097</b>	<b>800,428</b>
<b>Income</b>												
Grants & Reimbursements	0	350	350	0	0	0	200	0	200	200	350	550
Sales	0	0	0	9,290	2,934	1,758	400	0	400	9,690	2,934	2,158
Fees & Charges	0	0	0	9,300	3,117	4,845	1,900	3	1,900	11,200	3,120	6,745
Miscellaneous	3,270	2,100	2,100	3,600	339	742	0	0	0	6,870	2,439	2,842
<b>Total Income</b>	<b>3,270</b>	<b>2,450</b>	<b>2,450</b>	<b>22,190</b>	<b>6,390</b>	<b>7,345</b>	<b>2,500</b>	<b>3</b>	<b>2,500</b>	<b>27,960</b>	<b>8,844</b>	<b>12,295</b>
<b>Net Expenditure</b>	<b>263,980</b>	<b>161,061</b>	<b>336,259</b>	<b>190,350</b>	<b>139,617</b>	<b>292,374</b>	<b>159,500</b>	<b>44,576</b>	<b>159,500</b>	<b>613,830</b>	<b>345,254</b>	<b>788,133</b>

**Predicted Overspend 174,303**



## Joint Archives Reserves

	Staffordshire County Council £	Stoke on Trent City Council £
<b><u>General Reserve</u></b>		
Balance brought forward 1 April 2020	268,888	44,072
<b>2020/2021 Transactions</b>		
Air Conditioning - approved in 2019/2020		-30,000
Forecast Overspend in 2020/21 - Core Services		-900
Forecast Underspend in 2020/2021 - Sites & Public Services		38,100
<b>Subtotal (balance as at 31 March 2021)</b>	<b>268,888</b>	<b>51,272</b>
<b>Future Transactions</b>		
Staffordshire History Centre - match funding	-251,000	
<b>Balance Available (as at 31 March 2022)</b>	<b>17,888</b>	<b>51,272</b>
<b><u>Acquisition Reserve</u></b>		
Balance brought forward 1 April 2020	57,542	0
<b>2020/2021 Transactions</b>		
<b>Subtotal (balance as at 31 March 2021)</b>	<b>57,542</b>	<b>0</b>
<b>Future Transactions</b>		
<b>Balance Available (as at 31 March 2022)</b>	<b>57,542</b>	<b>0</b>
<b><u>Art Fund Grant - Minton</u></b>		
Balance brought forward 1 April 2020	0	10,301
<b>2020/2021 Transactions</b>		
Art Fund Grant - Minton Archive		-10,301
<b>Subtotal (balance as at 31 March 2021)</b>	<b>0</b>	<b>0</b>
<b>Future Transactions</b>		
<b>Balance Available (as at 31 March 2022)</b>	<b>0</b>	<b>0</b>
<b>Grand Total</b>		
<b>Balance at 31 March 2021</b>	<b>326,430</b>	<b>51,272</b>

Forecast Balance at 31 March 2022	75,430	51,272
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Notes:



# Appendix 3

Total
£
<b>312,960</b>
-30,000
-900
38,100
<b>320,160</b>
-251,000
<b>69,160</b>
<b>57,542</b>
0
<b>57,542</b>
0
<b>57,542</b>
<b>10,301</b>
-10,301
<b>0</b>
<b>0</b>
<b>377,702</b>

126,702

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

**Staffordshire and Stoke on Trent Joint Archive Committee  
12 November 2020**

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**Review of Fees and Charges**

**Recommendation(s)**

1. That the fees and charges proposed in Appendix two of this report be approved for introduction by the Joint Archive Service from 1 April 2021.

**Report of Deputy Chief Executive and Director for Families and Communities (Staffordshire County Council) and Director of Housing and Community Services (Stoke on Trent City Council)**

**Reasons for Recommendations**

2. The Archive Service fees and charges have been reviewed on an annual basis for several years to enable the Service to adapt its offer 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**

3. The Archive Service generates income from the following sources: a range of copying services; the sale of photographic permits; research, transcription and certification services; sales of publications; donations; and fees for talks by and group visits to the Archive Service. In addition, from 2014 the Archive Service has benefitted from income from its partnership with a commercial provider to make key archive collections available online.

4. During 2020/21 the Joint Archives Committee reviewed the charges for the Research offer and the associated fees. This year, following the pattern established over recent years, it is proposed to leave these charges unchanged and to review the supply of copies and the fees associated with talks, visits and permissions to publish.

5. The changes proposed in this report continue to aim for a simplified structure. It proposed to maintain a differential between copies ordered in the reading room and copies ordered by post. This reflects the staff time that can be involved in locating, retrieving, and checking that the material requested is physically suitable for copying. This differential is applied to the first copy, remaining copies being charged at the rate applied to copies requested in the reading room.

6. It is proposed that the differential between black and white and colour copies is removed and replaced by a single charge of £1.50 between the

previous charge. This is due to most orders being sent electronically to customers.

7. It is recommended that the charges for talks and visits, reproduction fees and group visits remain at the 2020/21 level as demand has dropped considerably during the COVID-19 pandemic and in recognition of the very low rates of inflation.

8. Income for the service is forecast to be 50-75% down on previous years due to the closure from March to July 2020 as part of the response to COVID-19. Since services reopened income has increased for photography and copying services.

#### 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 £27,960 which breaks down to £2,500 for the City service and £24,640 for the County service.

**Risk implications:** At this point in the year income is down by approximately 50%-75% due to COVID-19.

**Climate Change implications:** No significant implications.

**Health Impact Assessment screening:** No significant implications.

#### APPENDIX 2

##### STAFFORDSHIRE AND STOKE- ON- TRENT ARCHIVE SERVICE

##### REVIEW OF FEES AND CHARGES, 2019/2020 -attached to report

Author's Name: Joanna Terry, Head of Archives and Heritage

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Location: Staffordshire Record Office, Eastgate Street, Stafford ST16 2LZ

List of Background Papers

**STAFFORDSHIRE AND STOKE- ON- TRENT ARCHIVE SERVICE****REVIEW OF FEES AND CHARGES, 2021/2022**

The current fees and charges and proposed changes are set out below. The proposed new charges would apply from 1 April 2021.

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
<b>RESEARCH FEES</b>				
<p><b>1. Research Fee</b>            Scope: looking for information in the sources (archival, printed or published online) available to the Staffordshire and Stoke on Trent Archive Service. Providing information on our holdings from indexes or catalogues is not chargeable            Basis: Research orders will be charged in half hour blocks, with a minimum of half an hour and a maximum of four hours.</p> <p>People with disabilities which prevent them from accessing the sources in the reading rooms of the Joint Archive Service will be charged at two-thirds of the standard rate.</p> <p><b>1.1 Quick Research Fee</b>            Scope: looking for a single entry, article or item of information in a source on the basis of information provided by the enquirer which should lead directly to the entry or item desired and the provision of a single photocopy or transcription if found. This fee applies for the transcription of documents identified in the Staffordshire Name index. If a copy is requested and the source cannot be photocopied or transcribed within 15 minutes, the request will attract either the Staff Facilitation Fee or the Staff Photography Fee, not the QRF.            Basis: One quarter of the Research Fee            People with disabilities which prevent them from accessing the sources in the reading rooms of the Joint Archive Service will be charged at two-thirds of</p>	<p>£32 (£26.67 +£5.33 VAT) per hour to include the cost of up to 4 copies and UK/EU postage            Minimum charge £16.00 (£13.34 + £2.66 VAT) to include the cost of 2 copies and UK postage</p> <p>21.50 (£17.92 +£3.58) per hour to include the cost of up to 4 copies and UK postage for people with disabilities.</p> <p>£8 (£6.67 + £1.33 VAT) First class postage charged additionally.            £5 for people with disabilities</p>	<p>EU orders</p> <p>No change</p> <p>No change</p> <p>No change</p>	<p>Non-EU orders:</p> <p>No change</p> <p>No change</p> <p>No change</p>	<p>It is proposed to hold the increase to this fee made in April 2020.</p> <p>It is proposed to hold the increase to this fee made in April 2020.</p>

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
<p>the standard rate.  <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>£40 (33.33 +£6.67)</p>	<p>EU orders  No change</p>	<p>Non-EU orders:  No change</p>	<p>It is proposed to hold the increase to this fee made in April 2020.</p>
<p><b>2. Staff Facilitation Fee</b>            Scope: Staff time used to make a customer request for service possible, including but not restricted to</p> <ul style="list-style-type: none"> <li>• supervising documents outside the research room during professional photography, transporting documents to an external office for microfilming, conservation or other purpose</li> <li>• certifying the content of archives held within the service for use in religious legal or other proceedings</li> <li>• preparing or conserving documents in order that a customer order can be carried out</li> <li>• transcribing or translating documents in private hands</li> </ul> <p>Basis: The fee will always be equal to the Research Fee.</p>	<p>£32 (£26.67 +£5.33 VAT)            Minimum charge            £16.00 (£13.34 + £2.66 VAT)</p>	<p>No change</p>		<p>It is proposed to hold the increase to this fee made in April 2020.</p>
<p><b>COPYING CHARGES</b></p>				
<p><b>3. Photocopies and microform printouts identified and ordered in reading rooms</b></p>	<p>£1.00 (83p +17p VAT)  £2.00 (£1.67 +33p VAT)</p>	<p>EU orders  £1.50 (£1.24 +0.26p VAT)</p>	<p>Non-EU orders:  £1.50 (£1.24+0.26p VAT)</p>	<p>It is proposed to remove the different charges for black and white and colour and replace with a single charge of £1.50 per copy. This will make estimates for copying orders more straightforward to complete.</p>

FEE/CHARGE	CURRENT	PROPOSED		COMMENTS
<b>4. Photocopies and microform printouts ordered remotely</b>	EU orders: £5.00 (£4.17 +83p VAT)  Successive copies on same order (B&W) £1.00 (83p +17p VAT)  (Colour) £2.00 (£1.67 +33p VAT)	EU orders:  £5.00 (£4.17 +83p VAT)  £1.50 (£1.24 +0.26p VAT)	Non-EU orders:  £5.00 (£4.17 +83p VAT)  £1.50 (£1.24+0.26p VAT)	Retrieving, identifying and assessing the suitability for copying of items requested remotely add significantly to staff time in fulfilling such orders and the initial charge differential from the standard price is in place to reflect this. The cost of successive copies been altered to remove the differential between black and white and colour.
<b>5. Computer print outs on site</b>	20p (Staffordshire) 10p (Stoke)	No change		This charge is held in line with Library Service fees in the County and the City and will vary in line with any changes made by the respective Library Services.
<b>In-house Photography Charges</b>	£32 per hour fee for photography including prints (£26.67 +£5.33 VAT)  Minimum charge £16.00 (£13.34 + £2.66 VAT)  The Staff Facilitation Fee may apply if conservation or preparation work is required in advance of the photographer carrying out the work.	No change		The provision of the images to the customer by digital download, by DVD or by print- out on ordinary photocopier paper, in person or by post will be free. Photographic prints will not be provided by the Archive Service. It is proposed to hold the increase to this fee made in April 2020.
<b>7. Permit Fees for Use of Digital Camera</b>	£8 daily fee £50-00 annual fee			This fee has been held having been increased in April 2019.

FEE/CHARGE	CURRENT	PROPOSED	COMMENTS
<p><b>8. 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: £15 for first item, plus £5 for each additional item</p> <p>Commercial publication: hard copy/exhibition/ website: £50 for first item, plus £30 for each additional item E-book rights will attract an additional £50 per order</p> <p>TV broadcast and onsite filming and world wide web publication: £250 for world-wide rights for first item; £100 for each additional item.</p> <p>Filming on site only £200 per half day.</p>	<p>No change</p> <p>No change</p> <p>No change</p>	<p>The structure of these charges aim to support the local and academic research community and to ensure that commercial providers bear costs proportionate both to the time involved in preparing rights agreements for them and to the larger audiences they aim to reach. They were reviewed in 2018 and have been held this year</p>



FEE/CHARGE	CURRENT	PROPOSED	COMMENTS
<b>OUTREACH SERVICES</b>			
<p><b>9. Talks to external organisations and groups</b></p> <p><b>Group visits to Staffordshire Record Office and Stoke on Trent City Archives</b></p> <p>Page 23</p>	<p>Talks offsite £50-00 County/City £60-00 out of county</p> <p>Visits to Staffordshire Record Office or Stoke-on-Trent City Archives</p> <p>£50</p> <p>Visits which include a tour of the strongrooms and/or conservation will attract the Staff Facilitation Fee in addition. Visits on Saturday will attract the Staff Facilitation Fee</p>	<p>No change</p> <p>No change</p>	<p>Fees may be waived for retired / disabled groups at the discretion of the Archive Service.</p> <p>These fees were reviewed in 2018 and no change is proposed.</p>
<p><b>10. Use of meeting room (LARC) at Staffordshire Record Office per four hour session.</b></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>	<p>No change</p>	



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

**Staffordshire and Stoke on Trent Joint Archive Committee  
12 November 2020**

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**Staffordshire and Stoke on Trent Archive Service: Staffordshire History Centre  
Project Update**

**Recommendation(s)**

1. That the committee notes the update on the Staffordshire History Centre project.

**Report of Deputy Chief Executive and Director for Families and Communities  
(Staffordshire County Council) and Director of Housing and Community  
Services (Stoke on Trent City Council)**

**Reasons for Recommendations**

**Summary**

2. Work on the Staffordshire History Centre Project has continued to make progress since the meeting of Joint Archives Committee on 23 June 2020. The key areas of progress has been upon the audience research and learning.
3. The restrictions due to COVID-19 have impacted on the timescales for the project. Changes to the programme and the way work is completed have been discussed with the National Lottery Heritage Fund (NLHF). With their agreement, the timetable for submission of the round two application has now been agreed as 1 March 2021, pending the outcome of the mid-stage review in December.

**Audience research**

4. Considerable progress has been made on this work completed by the Audience Agency. An online survey took place during May and June receiving 440 responses. The aims of the survey were to understand the motivations for visiting, identify key market drivers, barriers to visiting, and understand more about users and other cultural venues they visited.
5. There was a spread of respondents across age groups, however there was a bias to those over 55. Most respondents were from Staffordshire and Stoke on Trent and 69% of respondents were female. About half of the respondents had visited the service before with Staffordshire Record Office the most frequently visited site.
6. The key motivations for in person visits were family and local history. Most people found out about the service offer through the email newsletter (which had included a link to the survey) followed by Facebook. There was high social media use amongst visitors with Facebook the most popular platform. The main motivations for accessing the social media offer was to keep up to date with talks and events and to see behind the scenes images of documents and objects.

7. 46% of respondents planned to visit the service in the future. The main barriers to visiting were lack of free time or awareness that it was possible to visit the service in person. Some respondents stated they lived too far away and others cited practical concerns such as lack of childcare or time, lack of transport, distance from a bus stop or a perceived lack of parking nearby. Some referred to feeling unwelcome, intimidated, or unsure of the process. The responses related to accessing the archives with little reference to exhibitions or events, except from two respondents who stated they were unaware of these programmes.

8. Two online focus groups were organised comprising a mix of current users and non-users of the service recruited from the online survey. The aims were to gain a better understanding of motivations for heritage attendance, expectations and preferences about the offer, perceptions of the offer, and test the proposed Staffordshire History Centre offer.

9. The two groups expressed interests in exhibitions and events relating to the Staffordshire Hoard and the pottery industries, which was expected. They also suggested themes around local industries, ancient history, social and political history' and how local history speaks to the contemporary experience.

10. Perceptions were very positive about the atmosphere at the William Salt Library, sense of community from the volunteers who work at the service, helpful, friendly polite staff, welcoming to children at the school sessions, and wanting to see further expansion of the digital offer.

11. Responses to the Staffordshire History Centre offer were unanimously positive citing the plans as 'modern', 'welcoming', and 'spacious'. In particular people felt it would be less intimidating, a place to pop in, and there was interest in exhibitions and the facilities.

12. Positive suggestions were made about thematic exhibitions with titles that were specific rather than vague. Talks and tours were popular and there was interest in them being available elsewhere in the county and not just Stafford.

13. Analysis of responses around the digital offer was that clear messaging was important about the ability to visit. Segmentation of the responses showed a mix of digital only users and digital and potential onsite visitor groups.

14. Audience Agency are now using the research to develop a Marketing Strategy for the Staffordshire History Centre.

## **Learning**

14. Since the last update Robin Johnson has completed the research on the learning offer. The survey of local teachers received 31 responses which was a significant number during the national lockdown. Common themes about the learning offer were:

- a. Needs to enhance, enrich and be relevant to, the school curriculum
- b. Requires pupils to put their learning into context

- c. Essential to be child-friendly and appealing to pupils and teachers alike
- d. Must be inclusive and accessible to all
- e. Needs to offer hands-on engagement for pupils
- f. Must be something that the school cannot (or is unable to) provide easily
- g. Venue and activities should encourage 'awe & wonder' in pupils
- h. Offers value for money

15. Teachers were asked what the single most important thing was that the Staffordshire History Centre should offer. In free text responses the common items were:

- a. Interaction with real objects and archive material
- b. Must be fun, interactive and hands-on
- c. Help to explain change over time (chronology)
- d. Bring history to life
- e. Encourage pride in Local history
- f. Offer something that can't be done in school
- g. Provide new experiences
- h. Offer a range of activities

The responses were supportive of the service bringing the collections together and using them to deliver activities. The Archive and Heritage Service will have a unique offer combining archive collections alongside museum objects and William Salt Library books.

16. The consultant also spoke to potential partner organisations for delivery of learning activities including: The National Trust at Shugborough, Freedom Leisure who manage Stafford Borough Council's heritage sites, Brampton Museum in Newcastle under Lyme and Redfern's Cottage in Uttoxeter. Whilst the conversations were positive the ongoing pandemic has prevented further work in this area.

17. Seven 'virtual' learning sessions were written exclusively using images from the collections of Staffordshire Archives and Heritage on the following themes:

- Mystery Staffordshire Objects
- Staffordshire Timeline
- Staffordshire Portraits
- Victorian Stafford gaol
- Discover your local area
- Design your own manuscript
- Create your own coat of arms

These were made available to teachers during the March-July 2020 national lockdown and downloaded forty times.

18. Obtaining feedback from schools was very difficult due to the COVID-19 pandemic as teachers were focussed on the safe re-opening of classrooms. The feedback which was received was very positive. Children liked the resources, particularly the timeline. They gave children an insight into, appreciation of and pride in, Staffordshire's history. The activities were adaptable and sparked creativity within children particularly the 'Create your own coat of arms' and 'Locked in' activities.

19. The final report has recommended several activities to engage teachers with the Staffordshire History Centre project including:

- a. Teachers Network and CPD
- b. Work placement opportunities
- c. Initial Teacher Training sessions
- d. Arts Award offer
- e. Schools outreach making visits to promote the offer

20. Other recommendations include promoting the offer to schools, developing a package for schools to buy into and re-working activities to target family audiences at weekends. The report also suggests price ranges for the learning offer and recommends quality assurance awards to validate the offer.

### **Design and Interpretation**

21. The design team, Pringle Richard Sharratt, have been recommissioned to update the design report once work on the Activity Plan is nearly complete. New work has focussed on increasing biodiversity within the garden at the site. An ecology report has been commissioned reporting on the current habitat.

22. Imagemakers have been recommissioned to update the Interpretation Plan. Their work will also include interpretation of the garden and restoration of the William Salt Library building.

### **Business and Evaluation Plans**

23. Progress has been made on the Business Plan using the results of the audience research to inform the market analysis. Information from the learning research will be added to the section on potential income for the History Centre.

24. The Evaluation Plan will be updated once the Activity Plan is almost complete.

### **William Salt Library collection work**

25. Work has resumed on the William Salt Library collection after NLHF agreed to reallocate the budget. This work is now being completed with support from the Collections Assistant to repackage recent accessions to the Library collections. The Assistant Librarian has continued working on cataloguing the collection prior to its relocation.

### **Capital funding**

26. On 15 May 2019 Staffordshire County Council's Cabinet approved the preferred option to deliver the History Centre with an NLHF grant of £3.9m. This option included two floors of storage and assumed the retention of the archive outstore at Unit QB. The agreed capital contribution from the County Council was £0.861m.

27. Cabinet requested that a detailed business case be prepared which outlined the costs and benefits of increasing storage from two to four floors to address storage

issues for both the Archive and Heritage Service and the Information Governance Unit Record Centre. Both services store records in two separate spaces within a shared facility at Unit QB in Stafford. The lease of the unit ends in 2025 and is being reviewed under the Strategic Property Rationalisation programme for potential savings. The business case was separated into two elements to meet the timeline for the Staffordshire History Centre project.

28. On 4<sup>th</sup> November Informal Cabinet considered the business case for extending storage as part of the Staffordshire History Centre project. The preferred option was to increase storage from two floors to four floors. This option enables the release of the Archive out store, provides storage space for 55 years which could be rented out to generate income or be used as part of the transition storage for the Record Centre business case to vacate the whole of unit QB. It would enable the Archive and Heritage Service to operate wholly from one site. Planning permission is required for the fourth floor however Stafford Borough Council has said it would support a higher storage facility.

29. Informal Cabinet approved the following recommendations:

- a. It is recommended that Option Four is the preferred option to deliver the Staffordshire History Centre with a National Lottery Heritage Fund (NLHF) grant, release the Unit QB Archive out store and provide additional Record Centre storage.
- b. That the planned capital investment of £6.332m is approved for the 4-storey extension of the Staffordshire Records Office (subject to confirmation of NLHF funding) and that this is added to the Council's capital programme.
- c. It is recommended that additional revenue provision is made of £0.196m from 2021/22 to meet the additional costs of this property venture.

30. Following this decision the County Council's capital contribution has increased to £1.894m , which means that the grant percentage for the project has reduced from 75% to 63%. The design proposals will be updated and the four-storey option will be presented at the mid-stage review with NLHF.

## **Timescales**

31. The review of the programme considering COVID-19 means the new key dates are:

- Mid-stage review with National Lottery Heritage Fund 10 December 2020
- Assuming enough progress is achieved submission of Round 2 application 1 March 2020.

The project team continue to meet regularly with NLHF mentors to review progress.

32. The mid-stage review is a key milestone in which progress is assessed by NLHF. Detailed feedback will be provided on the review and if the project is passed it will then be able to submit a round 2 application in March.

## **Appendix 1**

**Equalities implications:**

The National Archives, stakeholders, partners and staff have been involved in development of the project.

**Legal implications:**

Nominations to the development trust will be confirmed by legal teams in both authorities and taken through the appropriate corporate route.

**Resource and Value for money implications:**

The delivery of the Staffordshire History Centre will enable the Archive and Heritage Service to achieve a sustainable model for the future and deliver the MTFs saving of £468,000.

**Risk implications:**

There is a risk that funding will not be secured for any of the options. This will impact upon the accreditation status of the Archive and Heritage Service.

**Climate Change implications:**

The project balances online access and physical access to services and collections to offer options for remote use and not necessarily travel to multiple locations. Any new buildings will be compliant with modern standards for energy efficiency and minimise impacts on climate change. The project includes elements to improve the outcomes for wildlife and the environment.

**Health Impact Assessment screening:**

The project will offer opportunities for volunteers to get involved and add value to the service with support and accredited training programmes from staff. Volunteering provides many social benefits for individuals which can impact positively on health.

**Report author:**

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Room No: Staffordshire Record Office

**List of Background Papers**

Papers	Contact/Directorate/ext number
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of Part 1 of Schedule 12A  
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