

Committee: Joint Archives Advisory Board

Date: 13 April 2021

Report Title: Joint Archives Service: Consultancy Report - *A Review of Dorset Joint Archive Service*

For Recommendation to Cabinet

Portfolio Holder: Cllr J Haynes, Customer and Community Services
Cllr M. Iyengar, Tourism, Leisure and Culture, BCP Council

Local Councillor(s): All

Executive Director: [J Sellgren, Executive Director of Place](#)

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Report Status: [Public](#)

Recommendations:

- (i) That the Board note the findings and recommendations of the consultants' report and support the proposal that the recommendations form the basis for the future JAS Service Development Plan.
- (ii) That the Board provides a clear direction of travel for the JAS in relation to the report's recommendations, the service's likely focus of attention (section 5 of this report) and is mindful of the resource implications of any new workstreams.
- (iii) That the Board considers the future governance of the JAS in the light of the consultants' recommendations and delegates responsibility to Legal Services staff of BCP and DC Councils to generate one or more options for consideration.
- (iv) That the Board reviews the question of the JAS's dearth of archive storage and supports the production of a revised options appraisal to consider how best to resolve this issue.

Reason for Recommendation: To meet the reporting and decision-making requirements of the Joint Archives Agreement, 1997

1. Executive Summary

Following the Board meeting in December 2019, it was agreed that a consultant-led review of the Joint Archive Service's (JAS) functions and priorities should be undertaken. This would allow officers and councillors of the two new unitary authorities to fully understand the value and potential of the service and to assist the JAS itself in determining the most efficient

deployment of its resources. Through this process it is intended to create 'an archive service fit for the 21st century'. The report was issued in February 2021 and is presented here for consideration. Subject to the Board's decision, a new service plan will be designed to clarify and monitor the agreed priorities resulting from the report.

2. Financial Implications

The JAS has had standstill budgets for six of the last seven years and is working at capacity on a wide range of workstreams. Therefore, there is no additional resource with which to take on any new activity. New work would require either additional resource or a re-allocation of current resources within the currently available budget.

3. Well-being and Health Implications

None

4. Climate implications

None

5. Other Implications

None

6. Risk Assessment

Having considered the risks associated with this decision, the level of risk has been identified as:

Current Risk: **MEDIUM**

Residual Risk **MEDIUM**

The JAS has always operated within its budgetary means and will continue to do so. However, the challenge for the service will be how to balance its current activities and priorities alongside those identified within the report and to agree the most effective allocation of resources across a wide range of objectives.

7. Equalities Impact Assessment

The JAS completed a full EQIA in 2018. Areas for further consideration include working with younger people and with black and ethnic minority groups and religious minorities. Improved digital provision will also assist in providing greater access to collections for people living at some distance from Dorchester.

8. Appendices

Appendix 1: Joint Archives Service – Brief for Consultancy, January 2020

Appendix 2: *A Review of Dorset Joint Archive Service*, February 2021

9. Background Papers

None

1. Background

- 1.1 Following the Board meeting in December 2019, it was agreed that a consultant-led review of the Joint Archive Service's (JAS) functions and priorities should be undertaken. This would allow officers and councillors of the two recently-formed funding authorities (BCP Council and Dorset Council) to fully understand the value and potential of the service and to assist the JAS itself in determining the most efficient deployment of its resources.

2. Purpose of the Review

- 2.1 The brief (see **Appendix 1**) was composed and approved by BCP and DC council officers. It stated, with reference to the consultants' work that it would 'help to inform future service planning and delivery. The aspiration is to help define and shape a fit-for-purpose 21st century archive service.' The brief focused on a series of themes:
- Collections development and management
 - Audience development
 - How best to balance the reach of the service through place-based services and digital technologies
 - Public engagement via outreach and learning
 - Alternative delivery/governance model
 - Commercialisation and income generation
- 2.3 Each of the above areas would be examined by the consultant appointed, the JAS's current performance analysed and benchmarked and prioritised recommendations made as to the service's future direction of travel.

3. Methodology

- 3.1 Following an open procurement and interview process in early 2020, Elizabeth Oxborrow-Cowan and Associates (Heidi Bellamy and James Grimster) were appointed in March. The consultancy was prevented from starting by the Covid-19 pandemic. It was only in September 2020 that work was finally able to get underway.
- 3.2 The consultants visited Bournemouth and Dorchester in September 2020 and met with portfolio holders, councillors and senior officers from both BCP and Dorset Councils as well as JAS staff and stakeholders including the chairman of the Dorset Archives Trust. The consultants had access to all historic documentation relating to the JAS including reports to the JAAB, previous consultancy recommendations and all financial data.
- 3.3 The consultants issued their report in February 2021. The full report can be viewed in **Appendix Two** of this document.

4. Key findings

- 4.1 The consultants have provided a substantial and detailed analysis of the JAS's activities, its strengths and possible areas for change and prioritisation. The report's Executive Summary (pp 4-8) describes the JAS as an 'exemplar local authority service'. The JAS is complemented on its:
- Value for money when benchmarked against similar non-metropolitan archive services
 - Record on income generation
 - Sector lead in regard to digital preservation

- Strong relationship with stakeholders
- High quality collections
- Willingness to innovate and change

4.2 However, the report identifies additional areas for consideration, potential change and innovation. These are grouped together under the principal headings identified within the brief.

The recommendations within the report are detailed in nature. Below is a summary of the themes covered by the report and their associated findings:

- 4.2.1 **Governance (pages 9-16):** the report recommends the report recommends strengthening the JAAB with deeper engagement between its members and the service and between the JAS and officers within the two councils.
- 4.2.2 **Audience Development (pages 17-38):** Current links to user base are deemed to be positive and multi-faceted. The service needs to grow existing audiences and at the same time initiate work with tourism, younger adults, diverse communities and with BCP Council departments. The outcomes identified would be achieved principally through the use of digital technologies, e.g. greater online content, online volunteering and digital preservation services.
- 4.2.3 **Balancing digital and place-based services (pages 39-53):** The report states that ‘digital should be at the heard of future service delivery’ and that there needs to be a re-balancing of the resources required to provide (on-site at DHC) ‘place-based’ services and digital resources. Furthermore, there should be broader and deeper engagement with the **two funding councils** in order to better support their staff and departments and to align more clearly with records management and the corporate memory function. The net result of this would be that ‘stakeholders...recognise the JAS as more than just ‘The History Centre’.
- 4.2.4 **Income generation (pages 54-61):** The consultants state that the service is ‘effective’ at generating income. The consultants’ key suggestion is that the funding councils exploit the JAS to better effect in terms of records management and compliance with statutory obligations relating to information governance. They also make the point that there is no ‘silver bullet’ solution to increasing revenue and that some potential routes should not be pursued due to their likely limited returns. One potential solution would be to employ a self-funding commercial manager.
- 4.2.5 **Collection development and management (pages 62-70):** The report places an emphasis on transferring the corporate records of BCP and Dorset Councils in order to ensure the integrity of the corporate memory. It is further suggested that DHC makes a virtue of its cultural collections suggesting the term ‘Dorset Centre for Creative Archives’ to reflect this dimension. The consultants state that there is an urgent need to address the requirement for additional hard-copy archive accommodation.

4.3 The report provides a detailed set of recommendations (**pages 71-88**) which are placed into an order of priority and are grouped into three timeframes across a ten-year period.

5. Service perspective

5.1 The report provides an extremely positive appraisal of the JAS’s work to date, its value for money and its willingness to innovate and take on new challenges.

5.2 Some of the recommendations made within the report were already underway within the JAS’s workstreams, others had previously been identified as desirable. For example, the JAS is already developing a digital strategy and delivery plan to encompass all its digital activity ranging from social media to digital preservation and the digitisation of content.

- 5.3 In terms of the full set of recommendations within the report, there is now further work to do. We must identify some clear service outcomes and define the appropriate activity. We recognise that some actions will be achievable within current service model and budget and some that may need further invest to save business cases
- 5.4 Whilst any of the recommendations within the report could be prioritised, from a service perspective, three key themes stand out:
- That digital services will need greater resourcing and focus in the future
 - Integration and alignment of the records management functions within Archives for both BCP and Dorset Councils to safeguard safeguard corporate memory and improve information governance is essential
 - The pressing need to address the JAS's now acute dearth of archive storage.
- 5.5 The recommendations vary greatly in terms of size, scope and ease of deliverability. It is thus important to note that the resource implication for each activity will need to be carefully considered and the various interdependencies between activities and outcomes mapped to ensure that the most efficient approach to implementation is achieved. Various of the recommendations will require collaboration with other council departments and stakeholder bodies, others can be undertaken by the JAS itself.
- 5.6 It should also be noted that 'business as usual' activities will still need to carry on alongside some of the suggested workstreams within the report and there may ultimately need to be hard choices made as to how the service deploys its limited resources to best effect. There will undoubtedly be some 'quick wins' available, but many of the activities within the future service workplan will take much longer to deliver.

6. Next steps

- 6.1 The report represents a ten-year view of the service's future development and needs to be viewed within that context. The service has already started drawing up a prioritised workplan which will form the kernel of a new JAS Service Development Plan. This will be an iterative process and will change over time subject to resourcing and potential changes in priority. The plan will be presented to the Board at its next meeting. The key challenge will be how to ensure that resources can be allocated to support the developments identified within the report whilst maintaining core 'business as usual' services.
- 6.2 It is suggested that in order to take forward activity relating the consultants' recommendations that two separate pieces of work are carried out:
- A review of governance to be undertaken by Legal Services from both BCP and Dorset Councils to try to identify one or more option for change.
 - A revised options appraisal to consider potential sites or solutions for the JAS's need for additional archive accommodation.

7. Conclusion

- 7.1 *A Review of Dorset Joint Archive Service* has delivered a thorough examination of the JAS and has endorsed the quality of its work to date. It has provided a roadmap for the future development of the service, one that will increasingly look to digital technologies to acquire and manage records, reach new audiences and safeguard both the corporate memories of BCP and Dorset Councils but also Dorset's cultural heritage.

7.2 The JAS will positively engage with the report's findings and recommendations and will work towards delivering the best possible outcomes for both its funding councils, the residents of BCP and Dorset Council areas and everyone interested in the county's vibrant and rich history.

John Sellgren
Executive Director for Place

March 2021



Dorset Joint Archives Service Brief for consultancy work

Introduction

The pan-Dorset Joint Archives Service is seeking a consultant to carry out a review of the service's functions, activities and its audience engagement. The work undertaken will help to inform future service planning and delivery. The aspiration is to help define and shape a fit-for-purpose 21st century archive service.

Background

The Joint Archives Service (JAS), based at the [Dorset History Centre](#) (DHC) in Dorchester is funded by Bournemouth, Christchurch and Poole (BCP) Council and Dorset Council. The JAS provides access:

- On-site – to original sources at DHC
- Off-site – via community outreach and public engagement
- Online – through a range of platforms

The current service arrangements were agreed in the Joint Archives Agreement (1997), which was novated at the point of Local Government Reorganisation on 1 April 2019. Following recent discussions between senior officers and portfolio holders from both councils and whilst endorsing the principle and benefits of a joint service, it was agreed that an analysis of the service's current activities and the ways in which it manages collections and engages with audiences should be undertaken. This work will help to inform planning for future service delivery *and will help to support the transformational aspirations of both funding councils.*

The JAS is accredited by The National Archives and is a Place of Deposit for Public Records. It holds the corporate records for its funding councils and their predecessors.

The JAS serves two distinct areas; one mainly rural administered by Dorset Council, the other the large conurbation of BCP. It is important that the JAS serves audiences in both areas equally. How the service can address the challenges of geography within the constraints of a single-site location and fixed budgets lie at the heart of this question.

After 29 years, DHC's repositories are approaching capacity and the analysis provided by this work will also help to frame the future provision of storage for archives by the service.

Scope and objectives

Areas for consideration and analysis by the consultant will include:

- **Commercialisation**

Are there opportunities for the JAS to generate more income? If so, what would these be what barriers may exist towards achieving them? For example, could a service offer be packaged that would be attractive to individuals (social funded or self-funders) that presents the service offer in a way that supports loneliness or tackling mental health problems.

- **Collections development and management**

Are the JAS's acquisition and collections development policies aligned with national best practice and what should be the balance between levels of service and affordability?

- **Audience development**

Does the service maximise its ability to reach and engage new audiences? Could DHC improve its links with other heritage and tourism attractions within the county?

- **How best to balance reach of the service through place-based services and digital technologies?**

Are there ways that the JAS could better exploit digital technology to provide access to collections and to communicate information about the service (This could include the digitisation of archives.)? What should the balance be between physical and digital access and the concept of 'curated content'?

- **Public engagement via outreach and learning**

How can the JAS reach and serve its diverse audiences across the two council areas and what priorities should there be regarding how this is done?

- **Alternative delivery/governance model**

Is there a better way of commissioning and delivering the service through an alternative delivery model? What are other councils doing?

The consultant will:

- Review previous analysis on the JAS and undertake gap analysis to clarify what actions are required in order to fulfil the brief.
- Acquaint themselves with the service, its staff, functions and collections and review previous analysis of the JAS as per the material listed in Appendix 1.
- Meet with representatives of BCP Council and Dorset Council to understand their perspectives on the service and what outcomes they are seeking from the JAS.
- Engage with key external stakeholders to better understand their views and needs.
- Produce costed recommendations and a suggested timeframe for potential change with a view to any investment required, any increase in cost to deliver the service annually and potential additional income generated. This should include reference to statutory functions and those deemed 'value added'.

Approach and reporting

In addition to desk-based research and telephone contact, the consultant will ensure that they spend adequate time in Dorset with the relevant parties and will report regularly upon the progress of their work.

The consultant will submit a written report (1 x hard copy plus digital).

The oversight body for this work is the [Joint Archives Advisory Board](#). The consultant will, in addition to their written report be expected to present their findings to a meeting of this body so that elected members and officers can better understand the report's findings and recommendations.

The key officer contact for this work will be: Sam Johnston, Service Manager for Archives (contact information below).

Timeframe (provisional)*

As a result of Covid-19 and the Lockdown (23 March 2020) it proved impossible to start the consultancy when originally proposed. A new schedule in red below provides a provisional outline of the consultancy and the likely timeframe for its completion. This is of course subject to the prevailing conditions relating to Covid-19 and may need to be altered if, based on a risk-assessed approach, it becomes necessary to suspend work temporarily.

- March 2020: appointment of consultant
- March/April (**September**): consultant starts work
- May (**November**): consultant completes research
- June: (**December**) report issued
- June/July (**December/January**): JAAB meets
- July 2020: (**January/February 2021**) end of commission and start of implementation plan

Fee

The fee for this work will be within the range £10,000-20,000 (to include expenses and VAT). This will be paid in two equal parts, at the commencement and completion respectively of the commission.

Expressions of interest

Consultants are requested to submit an expression of interest for this commission stating:

- Their fee for the job with a breakdown of costs
- Their experience in the field of archives/cultural heritage
- A timetable
- Their approach to the commission

Submissions will be analysed and scored on the basis of quality (80%) and cost (20%).

Shortlisted candidates may be required to take part in a telephone/Skype interview

Deadlines for submissions is midnight on Sunday 1 March. These should be emailed to: sam.johnston@dorsetcouncil.gov.uk

Further information

For further information about the JAS and this brief, please contact Sam Johnston (sam.johnston@dorsetcouncil.gov.uk telephone: 01305-228929)

Background Information (available to the appointed consultant via the contact above)

- Reports to the Joint Archives Advisory Board (1997-2019)
- JAS Service Plan, 2019
- Sekkers Report, 2008
- Audit Report (South West Audit Partnership), 2015
- Activity Plan and project documentation relating to capital project bid to NLHF, 2017
- Archives Accreditation data, 2017
- Audience development report by Christina Dixon Associates, 2017
- Digital content report, Audience Agency, 2017

Elizabeth
OXBORROW-COWAN
Consultant Archivist

A review of the Dorset Joint Archive
Service
February 2021

Elizabeth Oxborrow-Cowan

Heidi Bellamy

James Grimster



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Acronyms

BCP – Bournemouth, Christchurch and Poole Council

DAT – Dorset Archives Trust

DC – Dorset Council

DCC – Dorset County Council

JAAB – Joint Archives Advisory Board

JAS – Joint Archives Service

NLHF – National Lottery Heritage Fund

TNA – The National Archives



Executive summary

This review found the JAS to be an exemplar local authority archive service. Some of its accolades include:

- The authoritative record on the history of Dorset
- A lower cost service - £1.16 per head of population compared with an average of £1.71 for a non-metropolitan council archive service
- A successful income generator – 2015-2020 JAS raised an equivalent of 87% of the BCP contribution or 74% of the DC contribution
- Rich collections with significant potential for user greater engagement, and a particular strength in creative and literary archives
- Accredited under the exacting national Archive Accreditation Standard
- One of the leading practitioners in the UK in providing digital preservation services to its funding councils
- Very strong reputation with user groups and partners e.g. active MoUs with Bournemouth and Exeter Universities
- An early adopter and horizon scanning for opportunities e.g. driving a consortium resulting in a 50% saving on digital preservation software

This review seeks to build on this quality by encouraging much closer engagement by the funding councils for their own benefit and for their residents, enabling stakeholders to recognise JAS as more than just 'The History Centre', and a carefully judged expansion of certain audiences, with digital service provision being central to all.

Governance

Governance needs strengthening. The Joint Archives Advisory Board (JAAB) only meets once a year and is not involved in strategic planning or advocacy and relationship building on behalf of the service. Consequently JAS remains a low profile service despite its potential to materially support council business, residents, efficiency and legal compliance.

Governance needs to be extensively revised. The JAAB should meet three times a year, have wider membership and engage in an on-going manner with the strategic development of the JAS. An alternative delivery model for the JAS is not recommended.

Audience Development

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The JAS has very good relationships with its current user base notably local and family historians, Bournemouth and Exeter Universities, certain Dorset Council departments, and other researchers. It has also undertaken interesting and impactful individual projects with non-traditional audiences such as dementia patients and the Romany community. However, JAS has value to more varied audiences and a responsibility to connect local residents to the collections. It is recommended that the service develop audiences as follows:

- Grow these existing audiences: Dorset/BCP localities, universities, Dorset Council departments, Health & social care, Arts Development Company, museum visitors, Library users
- Maintain traditional audiences: Individual researchers, 'Traditional' local residents
- Initiate: Tourism. younger adults, diverse communities, BCP Council Departments

Balancing digital and place-based services

Digital should be at the heart of future service delivery. The JAS is keen to provide digital services and with the on-going installation of the 'Epexio' discovery system (provides online facilities for accessing archival content) is well placed to develop these. Digital services will be of particular value in providing support to the Council, reaching local audiences and connecting with larger numbers of users. There will need to be a specific digital strategy and action plan to drive this work. It will also require the part-time digital preservation archivist to be returned to a full time post.

Place-based service delivery requires concentrated staff time and dedicated physical space but reaches relatively small number of people. So it should be used judiciously with a focus on going out to localities, nurturing specific target audiences (e.g. dementia care) and supporting onsite consultation of original material in the Searchroom.

Income generation

JAS is effective in raising external income. Increasing this income level will be difficult as there is no 'silver bullet'. Whilst there are some opportunities, e.g. an online image bank, by far the biggest financial impact is to enable JAS to support the councils' efficient management of records through advising on records management, working closely with the records management functions and providing digital preservation services. There are some activities that are not worth pursuing e.g. charging donors or having onsite catering. Income generation activities require some infrastructure such as online payment and booking system (providing by Epexio) and a self-funded commercial manager (part-time possibly) with suitable experience would help to maximise income generation.

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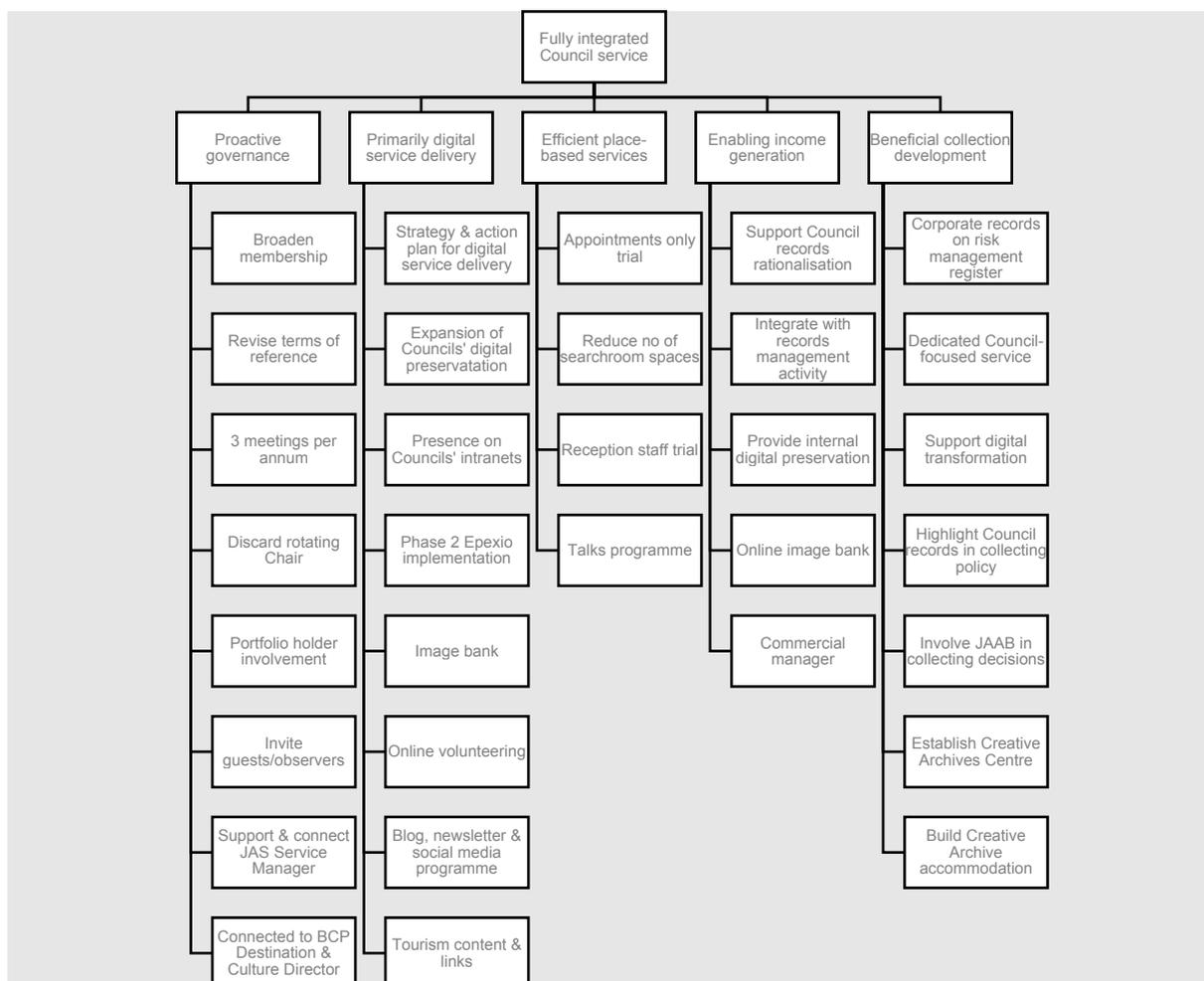


Collection development

JAS has rich collections which provide the authoritative record of the region's history. To continue that record and assure the Councils' coherent corporate record JAS needs to be able to broaden its collecting of Council records (through digital preservation activity for digital records) as well as continuing to collect key local records such as newspaper and family archives. JAS should also leverage the value of its striking literary and artistic collections by identifying itself as the 'Dorset Centre for Creative Archives'. In addition to developing activity and partnerships around that theme, it should also work towards new accommodation for these and future collections to help alleviate its very pressing lack of archival storage.

Priority recommendations

This report provides numerous recommendations. The priority recommendations have been chosen with the aim of providing the foundations for integrating JAS better into wider Council activity and reaching wider audiences through proactive governance, digital delivery and enabling Council-wide operational efficiencies. The priority recommendations are summarised in the following diagram:



1. Introduction and methodology

1.1 Introduction

This is a review of the Joint Archives Service (JAS) funded by Dorset Council (DC) and Bournemouth, Christchurch and Poole Council (BCP). The purpose of the review was to inform future service planning and delivery and help define and shape a fit-for purpose 21st century archive service. The review focused on the following areas:

- *Alternative delivery/governance model* - Is there a better way of commissioning and delivering the service through an alternative delivery model? What are other councils doing?

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- *Audience development* - Does the service maximise its ability to reach and engage new audiences? Could DHC improve its links with other heritage and tourism attractions within the county?
- *How best to balance reach of the service through place-based services and digital technologies?* - Are there ways that the JAS could better exploit digital technology to provide access to collections and to communicate information about the service? What should the balance be between physical and digital access and the concept of 'curated content'? How can the JAS reach and serve its diverse audiences across the two council areas and what priorities should there be regarding how this is done?
- *Commercialisation* - Are there opportunities for the JAS to generate more income? If so, what would these be? What barriers may exist towards achieving them?
- *Collections development and management* - Are the JAS's acquisition and collections development policies aligned with national best practice and what should be the balance between levels of service and affordability?

This report considers each of these areas in a dedicated chapter. Each chapter starts with a brief assessment of current operations. It develops a rationale for future development and then concludes with a set of recommendations. These recommendations are all summarised in Chapter 7 with an indication of costings, whether they can generate income or savings, and a timescale for implementation. The report finishes with a conclusion on the quality of the JAS and its future development.

Note that throughout the report the archive service is referred to as the JAS, although to many it is known as the Dorset History Centre.

1.2 Methodology

The review was undertaken between by Elizabeth Oxborrow-Cowan, Consultant Archivist, and Heidi Bellamy, Business and Governance Analyst and James Grimster, CEO of Orangeleaf Systems. The work included the following stages:

- Detailed review of all documentation pertinent to the JAS e.g. Council strategies, the JAS service plan, minutes of JAAB meetings, financial records, CIPFA statistics, the HLF bid documentation and previous service reviews
- A site visit to the History Centre
- 38 one-to-one interviews including officers and Councillors from the funding councils, internal and external users of the service e.g. council legal services, Bournemouth and Exeter Universities, project partners e.g. the Arts Development Company

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- Interviews with comparative services to develop comparator information e.g. West Sussex Archive Service
- A workshop with operational staff
- Extensive discussions with the Service Manager
- Detailed data analysis and development of the review report
- Presentation of the draft review to representatives of DC and BCP councils
- Development of the final review in the light of comments on the draft

The review was undertaken between April 2020 and January 2021. This was during the pandemic, which was a very demanding time for all public services. The authors are very grateful to all participants for making themselves available during this difficult period.



2. Governance arrangements and alternative delivery models

Governance is key to the JAS's development. Current governance needs to be strengthened to enable the the Joint Archives Advisory Board (JAAB) to be more proactive, attain improved profile and connectivity internally, and so unlock the potential of the JAS to better support Council priorities. Key revisions include: improved terms of reference; a broader membership; meeting three times a year with observers and guest speakers; active involvement in strategic planning and policy development. An alternative delivery model is not recommended.

2.1 Overview

With any shared service agreement Councillors will continue to be politically accountable and will need to feel that while services may be shared, they retain the right to determine policy, hold providers to account and work for the best outcomes for their constituents.

As such it is important to establish governance arrangements that provide an appropriate level of assurance for involved authorities about the performance of the shared function, and ensure that there are genuine opportunities for representatives from both parties to influence the strategic direction and operation.

Some of the most commonly cited challenges by local authorities for successful sharing services are cultural or behavioural. These can include political concerns over losing control of council services, or organisational resistance resulting from self-preservation and protectionism of services and roles amongst officers. Differing priorities and visions for a shared service can also hinder a partnership, as can the lack of a clear and agreed strategic focus. These issues can be overcome where there is strong and effective leadership which builds political and senior management support across the organisations.



There are several key benefits of a joint archive service that works across organisational boundaries to serve the population of Dorset; harnessing the collective resources, reducing duplication of effort and drawing on the existing expertise to improve front-line services, support efficient business processes and safeguard the Corporate memory.

2.2. Assessment of current governance

The current service arrangements were agreed in the Joint Archives Agreement (1997), which was novated at the point of Local Government Reorganisation on 1 April 2019.

The agreement stipulates that there will be a Joint Archives Advisory Board (JAAB) to oversee the management of the archive service. Schedule 6 of this agreement sets out the role in more detail as:

- a. consider and recommend plans policies and budgets for the Archive service
- b. monitor and review service delivery, performance and quality against approved plans and budgets.

The JAS has been subject to serial scrutiny¹ over the years through both internal and external review processes. Whilst it is wholly appropriate that the service should strive to enhance impact and resilience through a programme of continual improvement, interviews with JAAB members revealed that they are largely unaware of the preceding inquiries and the effect these have had on governance arrangements. Such reviews also divert the limited staff and financial resources away from work that can develop the service.

Originally the JAAB met 3 times per year. However, a report in 2015 by the South West Audit Partnership (SWAP) focusing on apportionment of costs and governance only noted that the governance model was viewed as 'being (arguably) disproportionately onerous to both officers and councillors relative to the size of the JAS's budget'. This conclusion was reached due to the cost of Democratic Services support to the JAS in comparison with two other pan-Dorset partnerships. The SWAP report recommended that JAAB meetings reduce from 2 or 3 annually to just 1 annual meeting.

¹ Previous Joint Archive Service reviews: Historical Manuscripts Commission review 1998, Public Record Office 1999, Kingshurst 2002 and 2003, Sekkers 2008, South West Audit Partnership 2015

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Whilst this revision to the formal business cycle will have acted to decrease the cost of officer support and member time, the infrequency of meetings has significantly reduced the level of Elected Member engagement and rendered the JAAB uninformed regarding the value and impact of the service.

Inspection of the minutes from recent annual meetings of the JAAB reveal that the level of attendance is low. Furthermore, each authority can send substitute members and the roles of chairman and vice-chairman rotate annually, which is likely to also hinder continuity and affect decision-making particularly with only 1 meeting per year. Furthermore, the length of JAAB meetings appears to be relatively short with very limited scrutiny of the JAS's work or strategic development, despite the significant amount of officer time devoted to developing papers for the meetings.

2.3 Impact on the JAS

The review has highlighted that the joint archive service has a very low profile within its funding councils. As such councillors and officers are unaware of the full service offer in terms of managing the corporate record, helping to ensure business efficiency and reduce corporate risk.

As a consequence of low profile, it is also very difficult for the JAS to get involved in wider council work and contribute to relevant initiatives, so neither council is getting anywhere near the full benefit of its investment. This issue extends to a failure to clearly signpost the JAS in the councils' public facing offer, so the full benefit of the investment of public money in the JAS is not realised either.

Governance needs to be substantially revised to be sufficient, consistent, or dynamic enough to enable members of the JAAB to effectively engage with strategic planning for the joint service and advocate for the JAS within their own Councils. .

2.4 Reporting into BCP

The original JAS agreement stipulates that authorised officers from each council should be appointed as the prime point of contact for the purposes, rights and powers set out in the agreement.



Currently the conduit for communication between the JAS and BCP is constrained as it is solely through the BCP Library Services. Consequently, the archives service is not positioned as a visible and acknowledged element of the Destination & Culture Team and does not have direct relationships with other relevant BCP departments that it could support (e.g Planning, Adult and Children's Services), Furthermore, within the BCP directory of services there is no reference at all to 'Archives', 'Records' or 'Dorset History Centre'.

As a result, relationship building with potential internal audiences is hindered and the archives service is not perceived to be part of BCP. The overall effect is that the profile for the archive service is low, the community outreach work largely unacknowledged and potential for the archive service to contribute to a range of council priorities unfulfilled. This situation results in the JAS being unable to demonstrate value to BCP, which then questions its financial contribution to running the service.

2.5 Recommendations on future governance and stakeholder management

In summarising the above, it is the opinion of the review team that the existing governance arrangement does not currently support the JAS to fulfil its function to best effect.

The archive service is well-led and supported by capable staff, but is denied reaching its full potential because of the existing governance arrangements, which inhibit delivery, constrain the service's contribution and as a result prevent the realisation of full value for respective funders.

The 1997 Agreement for Archives Services is very out-dated. It is recommended that this document is revised at the earliest opportunity in order to provide a firm basis for the future working arrangements.

The JAAB has a responsibility for this vital corporate service and needs to become fully engaged in driving forward its future. In order to move to a fully engaged decision-making body a number of changes are recommended:

- To revise the fundamental nature of the JAAB and broaden out the membership to create an Executive Committee that comprises of both Elected Members and also Senior



Managers from the respective councils. This would create better connectivity with the wider corporate priorities and help to progress opportunities to 'read across' into areas such as tourism and the living well longer agenda. It would improve understanding by encouraging corporate conversations about the role and value of the archive, helping to address the issue of poor profile for the service, and ensuring improved traction for actions arising from discussions.

- A linked key action would be to revise the terms of reference for the Joint Archives Advisory Board. As part of this clear expectations should be set out regarding the purpose of the JAAB and the role of those appointed these might include:
 - the optimal level of attendance;
 - anticipated level of participation in setting strategic direction, such as setting 5 year strategic plan and goals with accompanying action plan;
 - degree of involvement in overseeing management of the service;
 - whether financial accountability extends into budget setting and staffing changes;
 - expectations for monitoring and reviewing performance and quality;
 - including other stakeholders in discussions as required;
 - advocating for the service within the wider council structure;
 - identifying and pursuing opportunities for the service with individual council departments and with external stakeholders;
 - a commitment to staying informed about the work of the JAS and abreast of developments;
 - supporting initiatives and projects by amplifying the work of the JAS.

- The consultation process identified a lack of substantial strategic discussions and a need to instigate more frequent meetings at both strategic and operational level. To address this issue it is recommended that the frequency of meetings should revert from a single annual formal meeting to meetings every 4 months. This will better enable JAAB members to discharge their duty to advise and steer the archive service. Improved engagement could be gained by structuring agendas in such a way that they invite discussion rather than merely seek endorsement.

- It is recommended that the practice of a rotating Chair for each meeting is discarded. Whilst this was adopted to enable equity between the partners, in essence the infrequency of meetings and churn in political representation from the partner authorities has stifled active, involved leadership. Electing a Chair on a 2 year basis, with a Vice-Chair appointed from the other authority will encourage increased levels of commitment and provide greater consistency of decision-making.

- Between JAAB meetings it is suggested that the Portfolio Holders in both DC and BCP are encouraged to become more involved. The advent of virtual meetings has effectively resolved the previously experienced challenges of distance and time and more frequent, informal meetings will help to ensure the shared vision continues to

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evolve between the two councils in response to emerging opportunities and future challenges.

More generally, in order to ensure elected councillors in both DC and BCP are fully apprised of the role of the service in making accessible Dorset's archival heritage and its relevance in preserving the Corporate memory, it would be prudent for the JAS to develop a concise and engaging overview of the service, its performance and impact. This could be offered as part of a new members' induction programme and also used for advocacy elsewhere e.g. on services dedicated to internal users.

Furthermore, the JAS issues a regular ebuletin and a more proactive approach to ensuring key Councillors, particularly JAAB members, are signed up to receive this communication needs to be adopted. Likewise, content of the ebuletin should be tailored to showcase relevant activity e.g. good news stories the wider Councils can use, examples of how JAS has supported the work of other council departments.

To bring the work of the JAS to life, highlight critical issues and illustrate how the service is delivering priority outcomes across the full footprint of Dorset, it is recommended that guests are intermittently invited to attend JAAB meetings and present to the Board. This might include the Community Engagement Officer talking about the support provided to those affected by dementia or the outreach work with minority groups such as the LGBT community, or the Arts Development Company presenting on the social prescribing pilot of which JAS is a partner, or the Digital Preservation Officer on the importance of preserving the born digital record.

Dorset Archives Trust (DAT) plays an important role in raising funds from sources not open to a local authority service and has in recent years secured a grant of £20K for the Bankes archive project and, via crowdfunding, raised over £8K towards digitising the Herbert photographic archive. The charity also has two high profile patrons (Kate Adie and Philip Mansel), plus a well-connected President. However, currently there is no interconnectivity between the JAAB and DAT Board of Trustees. The Chair of DAT has expressed a desire to attend the JAAB meetings in order to help ensure that there is a shared understanding between the Boards. It is the opinion of the authors, that inviting the Chair of the DAT to regularly attend meetings in an Observer capacity would deliver dividends by way of enhancing and sustaining the work of the archive service.

To broaden communications between the JAS and BCP, the Service Manager for Archives needs to be supported to navigate the internal system and interface in a multi-faceted manner by directly accessing relevant officers. It is therefore recommended that future liaison with BCP is via formal reporting into the Director for Destination & Culture. This would better



enable regular conversations about shaping the archive service offer, embed the work of the archive within a broader team and help build connectivity with other relevant BCP officers. It would also help to ensure the proper management of corporate records and secure the long-term survival of key records series on the corporate risk register.

2.6 Alternative Delivery models

In 2014 The National Archives produced guidance on spinning out local authority archives services. This was driven by an interest in how new models of service delivery might deliver better value for money, the need for savings to meet challenging financial targets and more broadly the adoption of commissioning principles within local government.

As part of this review process alternative delivery models have been considered and a desk top review undertaken of the following archive settings in order to establish what benefits other approaches might afford.

Explore York Libraries and Archives:- Explore is an Industrial and Provident Society that is one third owned by staff and two thirds by community members. This legal form allows staff and community members to stand for election to the Board, sit on specialist advisory groups and vote at the AGM. Explore York Libraries and Archives initially had a five year City of York Council contract with a five year financial settlement to deliver public library services and archives. Key benefits cited through being an Industrial and Provident Society are that Explore is able to generate greater involvement of local people, able to access different funding possibilities and lever greater philanthropic giving, and now has the freedom to work with greater flexibility. Explore's business model is based on a range of income generating activities and they have set up a trading subsidiary: Explore Enterprises Ltd.

South West Heritage Trust:- a registered charity and a company limited by guarantee, which was founded in 2014 by Somerset and Devon County Councils. It acts to preserve and promote the heritage of the two counties, this includes responsibility for Archives & Local Studies and the trust holds the major written evidence for the history of Somerset and Devon. The expectation was that move to this model would enable greater flexibility and responsiveness to the needs of communities and customers, that it would be better placed to raise funds externally and that there would be savings realised through areas such as a reduction in business rates. The Trust's income derives mainly from grants and from contracts for the provision of heritage services; there is a 5 year funding agreement in place with the two councils. Traded activities are undertaken across all operations and this commercial activity generates 10% of the Trusts' income.

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Vivacity Culture & Leisure Trust - In Peterborough the Vivacity charitable portfolio was set up in 2010 and included alongside the archive a range of other culture, leisure and heritage assets, with gym and swimming driving the bulk of the income to support its full range of services. However, as a direct result of the financial impact of Covid-19, Vivacity announced in June 20 that it was transferring back services to the council. This example demonstrates the reliance of many cultural trusts on the profit-making elements of the portfolio.

Northumberland Archives – moved into the refurbished Woodhorn Mining Museum c. 2006 as part of the Woodhorn Trust until taken back into direct local authority management a few years ago. When it was moved into the museum there was dedicated investment in copying/digitisation assets with a view to creating an income stream from reproduction.

Furthermore, the Kingshurst Report of 2002 advised against the breaking up of JAS and creation of a Bournemouth Record Office as it would simply increase costs.

‘When set against national CIPFA figures, the Service offers value for money.’ The jointly-funded Service continues to be a low cost service (see Appendix 6).

In summary – the experience over the last decade has demonstrated that it is not viable for an archive service to operate successfully at arms-length unless they are placed within a broader cultural offer that has the potential to generate income. Given the uncertain economic climate, which has presented serious financial challenges over the last few months, resulting in a loss of income from face to face transactions and usage, and the high standing costs associated with running a facility, the review team are of the opinion that neither the Trust nor Mutual model are viable options and are not recommending that these are further considered at this time.



3. Audience development

The JAS has a familiar user profile for a local authority archive service. The major issues are not connecting with internal council departments, and Dorset and BCP residents located away from Dorchester. Future development should maintain and grow current audiences, but also focus on engaging new audiences internally, within diverse communities and through improving links with tourism.

3.1 Current audience overview

3.1.2 Local history and family history plus other researchers

These are the two most popular research reasons for visiting the Dorset History Centre. However, these core searchroom users tend to be of an older demographic and over the last decade there has been a decline of 40% in family historians and genealogists with visitors to the DHC opting to take photographs and staying for less time. The searchroom also hosts other types of researchers, often for business purposes including working with planning and archaeological projects or legal work relating to coroners, magistrates and solicitors.

The following table demonstrates the change in how users access the service over the last decade:

	Number of readers	No of items produced	Total attendance at learning events	Enquiries received	No of visits to website/ Page impressions
2009-10	8,431	9,440	1,968	5,298	111,170
2015-16	4,305	12,304	1,500	4,543	2,779,283
2018-19	3,586	13,380	1,100	3,131	3,654,317



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% change	-57	42	-44	-41	3187
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Since 2010 the number of readers has more than halved *but* the number of items being produced has increased by 42%. This bears out the anecdotal experience that there are fewer physical users, but they are doing more in-depth research having answered basic queries by themselves through online resources.

Attendance at learning events and enquiries received have also halved. However, use of online resources has exploded by over thirty fold and continues to rise. Indeed recent national research has shown the importance of digital engagement in culture to core audiences during the pandemic, with browsing an online archive or records office the fifth most popular activity² cited by 9% of Audience Spectrum respondents.

Set against the backdrop of decline in physical visits to the History Centre and the increasing expectations of users, in 2017 the Audience Agency³ was retained to explore what content current users and non-users would like to see online. Following a series of focus groups 'curated content' emerged as the most cost-effective means of engaging with online audiences. The suggested approach being to tailor content to ensure the long-term relevance of the archives by using stories that come from the collections to appeal to non-users. Following on from this work the JAS now has a [section on the blog](#) dedicated to telling stories from the collections.

3.1.2 Education and universities

JAS has a long-standing and very successful collaborative relationships with academics at Bournemouth and Exeter Universities including the History and English Departments and the Libraries. The JAS is greatly valued for the very high quality of its collections (e.g. very detailed social history, the Bankes archive, literary and creative collections), the extensive collection knowledge of its staff, the mentoring staff provide to students, and its openness to new collaborative opportunities. JAS hosts visits from tutors who bring whole classes onsite to learn about the collections and this is followed by individual undergraduates undertaking their own research, PhD students also use JAS collections onsite as do some academics. As one lecturer said 'JAS is a really firm part of our complete history programme'.

JAS has been involved in specific projects beyond student and academic support e.g. Exeter University will be applying to the government for £1mn to fund post-doctoral roles and digital

² COVID-19 Cultural Participation Monitor, The Audience Agency 2020

³ [Digital Content Research Findings](#), The Audience Agency 2017

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equipment to transcribe and edit the 5000 letters to Thomas Hardy from around the world. JAS is a project partner (as is The National Archives) and will make an in-kind contributions with JAS staff time to advise and mentor with PhD students. It collaborated in a 'Festival of Learning', has advised on looking after the Bournemouth University Archive and provides charged-for conservation services.

All of these groups value having such high quality collections in their region rather than having to travel more widely across the UK. Bournemouth particularly values the collections as many of their students originate from Dorset so appreciate the proximity of the service. Tutors consider that student work placements significantly enhance students understanding of resources, but also their employability particularly in the heritage sector.

JAS seeks to support academics engage. The JAS team are focused on growing use by mobilising academics to encourage other academics and PhD students to use the archive resources via that highlight how accessing the collections has assisted and enhanced their research. Also, the Dorset Archives Trust offers a travel fund to assist suitably accredited students wishing to travel to Dorchester for the purposes of accessing the collections.

JAS is recognised by its university allies as being valuable to the universities' strategic goals around external engagement, regional partnership, providing a high quality research environment and delivering a superior student experience The value of JAS is recognised by the fact that it has MoUs with both Bournemouth and Exeter Universities to support collections, research , training, education and local engagement and the universities are very keen to expand their relationship with JAS. The university contacts are actively using these MoUs to promote working with JAS within their institutions.

The Centre also welcomes school groups, although the lack of a dedicated learning officer compounded by the restrictions imposed in the wake of the pandemic, has meant that only two such visits have taken place in the last year. As noted in the 2017 HLF bid Audience and Activity planning about working with schools 'that it is not sustainable without dedicated staffing.' However, the recent employment of a fixed term learning officer post has resulted in some great [education and learning resources](#).

3.1.3 Public outreach

Over the last five years there have been a number of notable audience development achievements that have expanded the reach of the archives offer beyond the confines of the Dorset History Centre and out into the community benefitting non-traditional users and contributing to increased access and appreciation of the archival resource. These initiatives

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have engaged with a wide range of groups and organisations and demonstrate how the JAS is contributing to objectives within both Councils strategic plans:

- Bournemouth, Christchurch and Poole Council – Council Plan (2020) *‘to facilitate new opportunities for communities and people to engage in creative and heritage activities to benefit their wellbeing’*
- Dorset Council – Council Plan 20-24 *‘Enable people to feel a sense of belonging and to participate actively in their community’*

Of particular note in terms of demonstrating the breadth and reach of the service are the following initiatives:

- The archive service is one of the partners offering sessions as part of [‘My Creative Life’](#), an initiative coordinated by The Arts Development Company to pilot the delivery of adult day care differently.
- Working with Dorset Area of Outstanding Natural Beauty - a twice-monthly session entitled [Inspired by Archives](#) where participants enjoy pictures, maps, documents or recordings and learning something new about the natural world and local artists. It has been running for over three years and helps to support those living with long term health conditions, such as dementia, and their care partners
- Over the last few years DHC has offered three supported placements each year for young adults facing additional challenges, as part of the [Ansburys Face Forward](#) project that supports disengaged and socially excluded to overcome barriers to engagement, education, training and employment.
- The service has worked closely and sensitively with Bournemouth’s LGBT+ community to reflect their history and experiences through a set of [oral history recordings](#). Some of this material has been used to support a partner’s exhibition and the majority of interviews are also available to listen to on-line.
- Staff have also continued to build relationships with representatives of Bournemouth’s Jewish community and have added a small but significant amount of material to the collections to ensure that this important aspect of the conurbation is represented.
- An initiative is currently underway with the Gypsy-Romany-Traveller community, through its cultural support organization [Kushti Bok](#), to build resilience and to collect heritage, in the main via the oral tradition. This is likely to be the subject of a funding bid to NLHF.

As part of the work linked to the Dorset History Centre: Capital Project⁴ research highlighted that 41% of users are in the 45-64 age bracket and 37% in the 65-74 bracket. Furthermore, less than 20% of users are new to archives, so this coupled with a decrease in all ages of users except those who are over 75, suggests that the market is not renewing itself very well.

⁴ ‘Best fit’ audience and activity planning opportunities - 2017

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A non-user survey was also undertaken as part of the HLF project research, which highlighted that a lack of information regarding the content available and how to access this was the key barrier to using the service.

The team at JAS has identified some ways in which to improve their visibility and engage with non-users at scale by participating in popular established cultural and heritage events, such as the Thomas Hardy Victorian Street Fayre and Architectural Heritage week. The increased use of Twitter has also helped to diversify users; @DorsetArchives has over 2500 followers and is a way to showcase archival content linked to topical themes. For example at the time of writing a campaign devised around Advent was underway, featuring gems from the collection such as the oldest document, a charter from Edgar the Peaceful, examples of Poole Pottery tiles and seasonal photographs.

3.1.4 The Councils

JAS has a low profile in Dorset Council and there is little understanding of the proactive role it can play in efficient business operations and observation of statutory requirements around General Data Protection Regulation (GDPR) and Freedom of Information (FOI). However, there has been some productive relationships and the breadth of its existing activity is outlined in Appendix 11. JAS holds some of the historic records for the Council and manages to gather some of the archival records. It has also had some successful projects e.g. digitising a proportion of adoption records to support their retention for at least 100 years and improve business efficiency. Within the Council the service is starting to gain traction around the importance of digital preservation but there needs to be wider awareness both of the need to implement this and how JAS can provide expert support and is not just a 'history centre'.

JAS has virtually no presence or profile in the management of BCP's corporate record other than managing the Coroners' records. BCP's and its predecessor's records have never been subject to proper records management. This puts BCP and its corporate record at significant risk of loss, misuse and legal infringement as well as driving inefficient business processes.

3.1.5 Health and social care

The Joint Archives Service: Service Plan (2018-21) states an ambition under Priority 3 to provide positive outcomes for people, with additional needs, who would be unlikely to engage with the JAS and its collections.



In 2015 the archive service took part in The National Archives Commissioning pilot. The process raised the profile of the archives as a resource among senior social care practitioners and was credited with helping to develop a number of new partnerships including:

- Reminiscence work with Community Mental Health Team and the Dorset Partnership for Older People Programme;
- Arrangement with a local care farm that provides Back to Work DWP training to bring groups on a tour of the archive, alongside a connection with two charities for learning disabled people.

[My Creative Life](#) – is another example of how the JAS is already working as part of a pan-Dorset initiative to help support older people facing isolation and loneliness drawing on the rich archival collections to offer participants a choice of different creative activities outside of the usual day care settings. This project was developed in response to a brief from Dorset Council’s commissioning team, who provided match-funding, and hoped to evidence the benefits for older people of stimulation and social connection. The intention was for each session to feature something from the collections such as orchard lists, children’s letters, antique film, Poole Pottery design books and participants would then be encouraged to make a creative response. Planned for delivery by the JAS Community Engagement Officer to engage older people in Sturminster Newton and Weymouth during April & May 20, due to the pandemic these activities have been postponed for the foreseeable future.

3.1.7 Library users

Despite recognition that the services are complementary, engagement with the Libraries’ offer in both Dorset and BCP is currently piecemeal. This is primarily due to lack of capacity on both sides. In the past the JAS provided a touring exhibition of the Bankes collection, which was well received, but required significant support to curate and move around the county.

3.1.8 Museum visitors

JAS has worked with a range of local museums in a variety of ways such as collaborating on community projects, providing expertise around local and family history, supplying digitisation services and joint working on acquisitions with items saved from private collections.

3.1.9 Tourism

Tourism is a significant driver for the Dorset economy, valued at £1.8bn and providing a GVA of £1.2bn. It also supports over 43,000 jobs in the county⁵. Anecdotally, tourists come from as far afield as Australia and America to visit places where their family hail from, but as much

⁵ Dorset Tourism Study – Dorset Tourism Association

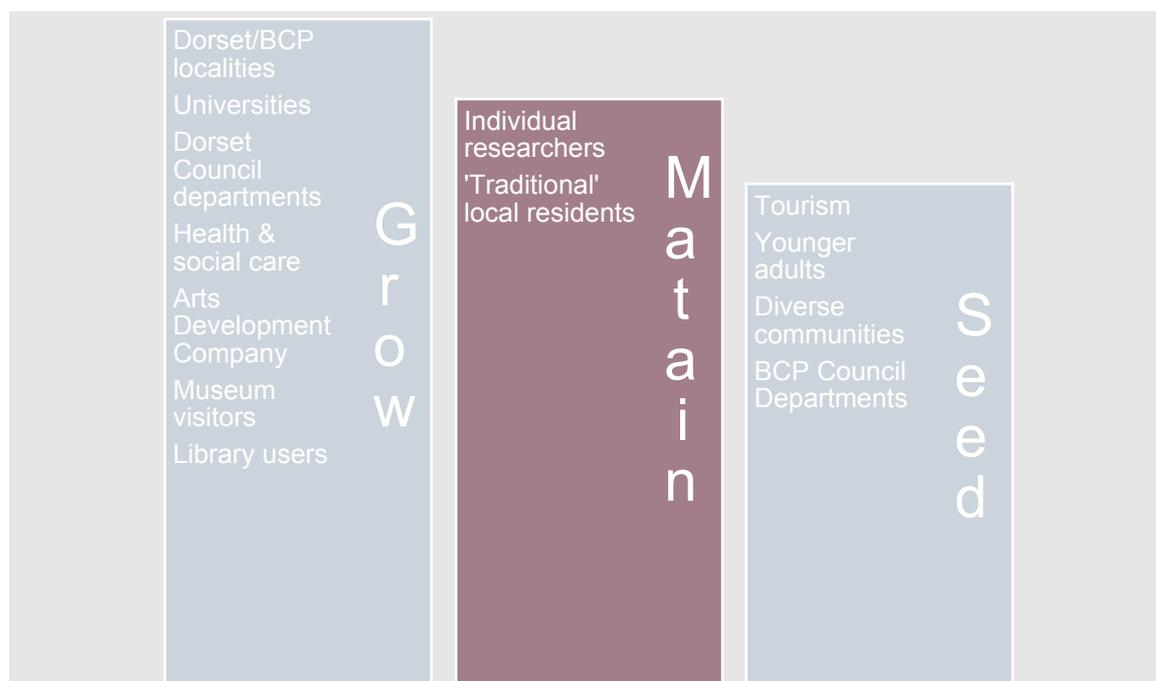


of the research is undertaken beforehand via the Ancestry website it is difficult to quantify the impact of the archival record in helping to inspire a visit to Dorset.

3.2 Recommended target audiences for future development

There is extensive potential demand that builds on existing audiences and expands out to new audiences. These also offer new funding opportunities by linking to partners with access to other resources e.g. the universities, arts bodies, museums, charities. To fully capitalise it will be essential to strengthen the existing relationships and develop links with other heritage and tourism attractions within the county.

JAS audiences can be viewed in three groups – to be maintained, to be grown and expanded or to be initiated or ‘seeded’ as the following graphic shows:



All these audiences dovetail into the JAS's purpose and collections so their development is a reasonable evolution of the service.

3.3 Audiences to be grown



3.3.1 Individual localities

During the research for this review delivering content to individual localities was a constant theme. Although the JAS is available for all residents, its Dorchester location precludes easy contact throughout this large rural county and with the key conurbation of BCP. Curated content focused on individual localities plus carefully located outreach work (possibly with partners like the libraries and museums) would significantly expand the offer to residents across the county of Dorset.

3.3.2 Local Universities

There are numerous opportunities for JAS to grow its positive relationships with the universities. It will be question of deciding strategically what will work with JAS's wider plans but opportunities include:

- More student placements
- Collaborative PhDs
- Working JAS collections into 'big picture' work by the universities around digital and creative economies
- Engaging with the universities wider strategies e.g. Exeter University's heritage strategy
- Sharing its work with particular communities, notably the Romany community, with specific academics who have an interest in the history of those communities

3.3.3 Dorset Council

JAS should continue to collect the archival record for the Council and support the Council in updating and applying its records retention schedule (see Appendix 10 for how West Sussex Record Office has supported its council through records management but also other activities). JAS should also be enabled to expand its digital preservation activities for Dorset Council, although it will need to work to promote this as digital preservation is not a focus of the 'Digital and Change' strategy.

Particular target areas for its services could be:

- Democratic Services
- Planning
- Children's' Services
- Health
- Infrastructure



The JAS could provide a range of support in addition to securing the corporate record. It could also digitise and provide access to records either for staff or the public, applying its professional knowledge of GDPR and FOI to ensure such access was properly handled. Applying its extensive customer service experience, the JAS could also be employed in the Council's work to overcome digital poverty and digital skills gaps in residents by providing a safe, approachable 'face' of the Council to contact with potentially vulnerable residents. However, extension of JAS's activities will require increased capacity, possibly funded through the efficiencies derived from good records management.

As well as managing the corporate record JAS should be seen as the conduit and manager for heavily used records, rather than a passive recipient of old records. For example, Dorset's population and job numbers are forecast to increase by around a projected 45,000 (net) in the next twenty years⁶. The inevitable new building developments could be informed by records held by JAS through working with Section 106 officer to support placemaking and the integration of 'in-comers'. For example, the developer of Brewery Square in Dorchester connected with the history of the site and provided the Dorset County Museum with a unit for 6 months' rent free which it used for a small temporary exhibition focusing on the brewery industry. This proved very popular for engaging with passers-by and although it was free entry donations were encouraged and some income derived from the linked retail offer.

3.3.4 Health and social care.

The previous work outlined in 3.1.5 above has helped to build understanding between the archive service and adult social care, providing a solid platform to build on in the future. A priority moving forward for Dorset Council is to ensure that people are supported to live their best lives through the 'Better Life' transformation programme. This transformation programme will seek to encourage other offerings beyond traditional day care for those with a personal budget. So developing activities that engage people in new ways, that will suit their interests whilst also meeting their identified needs, fits with aspirations for future delivery. Furthermore, the consultation process for this review prompted renewed discussions between adult social care and the archive service, which has resulted in a commitment to engage them in 'A Better Life' transformation process so that they are aware of what is changing and how to engage with emerging opportunities.

Given that there is a large population of older people, over 7,000, in Dorset living with dementia there is a clear role for the JAS to continue supporting reminiscence groups. In addition to the sessions based at DHC, there is also an opportunity to extend facilitated reminiscence into independent care homes; using existing presentations created from archival materials transferred onto i-pads. For individuals, consideration should be given to creating portable themed memory bags, these might contain photos, song lyrics, poetry,

⁶ [Dorset LEP – Future Housing Provision](#)



quotes plus a simple conversation starter guide to provide prompts to trigger a positive conversation. These memory bags would be available for loan and there is opportunity to develop this initiative working through the library service in DC and BCP. It is recommended that the team analyse the associated expenditure in terms of staff time for development and delivery, plus materials and pitch the package accordingly to ensure full cost recovery.

Mental health prevalence and outcome indicators drawn from the Quality and Outcomes Framework and Public Health Outcomes Framework indicates a statistically significant difference from the respective English Average. There is an emphasis on prevention and early intervention and where the JAS might best interface is around creative activity that brings people together as per the [Five Ways to Wellbeing](#)⁷, a set of evidence-based messages aimed at improving the mental health and wellbeing of the whole population.

The JAS holds the archive of Herrison Hospital (Dorset Asylum), which dates back to 1832 and contains over 12,000 patient records as well as a wide range of material relating to the operation of the hospital. In recent years the JAS secured funding of over £56,000 from Wellcome Trust's research resources grants scheme to fund the employment of an archivist for 12 months to arrange and catalogue these records. This material now offers great potential to engage new audiences, delivering heritage, social and mental health outcomes by taking an approach similar to that of Norfolk Archives in their nationally acclaimed '[Change Minds](#)' project.

Mental Health Case Study - Norfolk

Drawing on late 19th Century case records with admission and discharge photographs from Norfolk County Asylum, [Change Minds](#) was devised primarily to support those who live with mental health conditions. However, through the linked digitisation programme access and engagement has been greatly expanded; the records had been consulted on average 108 times a year between 2010 and 2015, but digitising has subsequently attracted 30,000+visits. Furthermore, a linked exhibition attracted over 1000 people in 3 days. Significant profile and positive media coverage has also been garnered from the project with a linked conference and [good practice guide](#) published, which have demonstrated the value of the archives in terms of social inclusion and person-centred recovery. The initiative has importantly embedded the archive as a fundamental contributor to the mental wellbeing work within the county's' Joint Health and Wellbeing Strategy.

⁷ [Five Ways to Wellbeing](#) – New Economics Foundation



It is recommended that the JAS explores opportunities to co-produce a bespoke programme with the Dorset Mental Health Forum, which is a user led organisation.

Significant time and resource have already been invested by JAS staff in seeking to find out if and how the archives service might position itself in order to be commissioned by other services. Whilst some work has continued in support of dementia sufferers, and people with specific learning needs, additional capacity is required to explore further opportunities that will contribute to commissioners priority outcomes, and develop appropriate responses that draw on the archival collections.

3.3.5 Working collaboratively with The Arts Development Company

Clear routes for collaboration with ADC already exist with the JAS acting as a partner in a social prescribing pilot and, prior to the restrictions imposed by Covid-19, were planning a series of workshops to support young men looking to improve their mental health.

However, despite the established working relationship between ADC and JAS it became evident that opportunities to collaborate are being missed due to the focus on the forward facing plans for the archive service rather than potential of the collections. Collaboration is heavily reliant on resources and the capacity of the two teams, with ADC and JAS reliant on securing external investment to bolster their endeavours. In order for there to be a more comprehensive and targeted audience development approach across the two organisations, there would need to be dedicated funding available. This ought not to be perceived as an insurmountable barrier, as collaborative funding bids between ADC and JAS have been successful in the past.

The county of Dorset has a long history of inspiring and nurturing artists and creative practitioners. Dorset History Centre has been actively engaged in the collecting strand of [Archiving the arts](#) with the archives of Dame Elisabeth Frink (sculptor), Mary Spencer-Watson (sculptor), Rena Gardiner (artist), John Makepeace (furniture designer) and also the archives of the Poole Pottery all deposited at DHC. This collection could be better profiled by working in tandem with ADC to promote it actively as a primary resource amongst practicing artists and to audiences with an interest in the arts. This would help to encourage creative practitioners to respond to, reinterpret and cascade out new work based on the historic material resulting in a yet broader and different audience reach. Indeed by packaging the highlights of the collection held at DHC, it would be possible to create an archival centre for literary and artistic excellence in Dorset that could be linked into the collections of local museums such as the Russell-Cotes Art Gallery & Museum. Such a proposition is likely to resonate well with the ambition that culture will be central to the future success of BCP as a new unitary authority. The move would also help to establish the archive service as a credible contributor to the visitor offer and has the potential to form the basis of a compelling



collaborative funding proposal alongside university and creative partners and access new funding streams e.g.. Arts Council England.

3.3.5 Museum visitors

During the course of the review a virtual workshop was also held for three of the county museums to help the consultants team understand the operating environment and identify potential opportunities for the JAS to collaborate. The session also explored how the JAS could engage new audiences and improve its links with heritage and tourism attractions within the county.

It is clear that JAS has a significant role to play in helping to reinforce the existing cultural and heritage offer in collaboration with museums, libraries and heritage sites across Dorset. For example there a number of archival gems that could be capitalised upon and feature within exhibitions as part of the offer at established visitor attractions. This might include displaying items such as letters, diaries, photographs and drawings from the Bankes family estate at Kingston Lacy, which is now part of the National Trust estate. The outcome would be that items from the collection would reach more people, the experience of visiting an established attraction would be enhanced, and there would potentially be an increase in dwell time that led to more secondary spend.

Furthermore, the Dorset County Museum is currently closed for a multi-million pound redevelopment. In the meantime, the Museum is continuing to inspire, educate and entertain on its county-wide tour exhibiting in towns and at events across Dorset. A number of those consulted during the review process felt that there were clear opportunities for the archive service to contribute to a programme of exhibitions around the county drawing on archival material held at DHC, potentially supplemented by that from national institutions displayed alongside e.g. British Library first editions of books by Thomas Hardy alongside his literary manuscripts, Parliamentary acts and plans relating to the railways alongside local material such as plans of railway undertakings and photographs of locomotives and stations.

Other opportunities exist to interface with or replicate successful cultural initiatives that have been devised to broaden the appeal of collections and engage with a different type of audience e.g. Lyme Regis Museum's popular fossil walks, which also includes access to the museum where visitors can see displays of rare fossils and learn about Mary Anning, the famous early palaeontologist. The JAS could seek to partner with another cultural institution and develop content for literary, artistic and historical walks and trails.



An example of the major benefits arising from depositing archival at DHC was also provided during this session, whereby elements of the Thomas Hardy collection had been relocated during the county museum refurbishment and has since been made a permanent deposit. Access has significantly improved; previously visitors needed to make an appointment to view these items at the museum, but this is now an 'on demand service', as there is a proper reading room and the materials are part of the JAS catalogue. Furthermore, the JAS (with DAT's support) has secured the purchase of a £50,000 collection of Hardy material to augment the archive. Whilst the review has highlighted some considerable reluctance to relocate archival materials to DHC for reasons such as distance and a strong sense that the records should be held locally where possible, this testimony highlights the care, conservation and access that can be afforded.

3.3.6 Library users

Libraries are a natural partner for JAS. The ideal content for libraries is pre-formed heritage packages that are highly visible to users and will act to introduce them to elements of the archival record in easily digestible chunks. Topical links to well-known local people, landmarks and historical events that bring in different formats such as documents, photographs and music are more likely to appeal to a browsing audience.

One interviewee graphically explained the importance of libraries for the JAS. 'Many people exploring family history will go to the library first, but most people don't know the History Centre exists. So the library should be screaming from their web pages and their sites about the History Centre. [Also,] The most vulnerable people in society go to the libraries (homeless, lonely). What goes on in the History Centre is an eye-opener, a distraction, a wonder for them.'

3.4. Audiences to be maintained

JAS has very long-standing 'natural' audiences who it must continue to serve i.e. users of the searchroom and local residents who are naturally attracted to its core offer. Searchroom users are very self-motivated and require contact with original material with support from knowledgeable staff. They are less interested in a curated offer. This audience includes personal and academic researchers as well as those using the archive for business purposes such as solicitors, architects, developers and journalists.



Likewise there is a segment of the local population that is naturally drawn to JAS's offer such as talks and volunteering. These tend to be older, white residents who live closer to Dorchester.

Inevitably digital services will convert some remote users into onsite users when they decide to consult the physical collections in person. There is also a growing trend of researchers visiting to take their own digital images in the searchroom of collections and then study those images at their leisure once they have left the site.

3.5 Audiences to be 'seeded'

During the course of the review, two consultative workshop sessions were held that included exploration of the top five audiences for future development. Local residents and young people were consistently mentioned as priority future audiences.

In addition to established core users such as local history groups and academics, the workshop with JAS staff indicated an interest in seeking to engage minority communities, Gypsy/Romany, communities in urban settings and those that were geographically remote, plus furthering the work to support vulnerable people experiencing mental or physical health issues.

The workshop with museums representatives perhaps unsurprisingly highlighted a future focus on attracting visitors, but also with the backdrop of the pandemic, an intention to develop offers for the socially isolated.

3.5.1 Heritage Tourism

In 2018 29.4 million visits were made to Dorset as either a day trip or overnight stay, with natural environment and rural landscape, world heritage coastline, and seaside towns of Bournemouth, Christchurch & Poole acting as major draws.

Growth is the key priority for the Dorset LEP and the Destination Management

Organisations, particularly addressing seasonality, through developing 'new' experiences that are not weather dependent and attract visitors during the shoulder and off-peak period. Creating a unique sense of place relies on drawing on the Dorset's culture and heritage. However, currently the historic record is not seen as a valuable resource. There was



scepticism regarding the relevance of the JAS offer and whilst heritage is certainly on the radar, it was in relation to visitor attractions.

The JAS needs to forge stronger links at strategic level with Visit Dorset, the Destination Management Board for Bournemouth, Christchurch & Poole and the Dorset Tourism Association, who act as the coordinating body for tourism across Dorset. This is particularly timely as the Destination Strategy for BCP is currently being reviewed, with the aim of trying to shift the balance of day trips to more staying visitors.

The market characteristics⁸ of Dorset visitors using the Mosaic methodology indicates a number of domestic segments to whom a better profiled heritage offer would be likely to appeal:

- Prestige Positions 12% - are the most prolific short break takers in the UK population. They are likely to prefer heritage cities and up-market seaside towns and enjoy culture and sight-seeing.
- Senior Security 11.2% - this group typically travel during shoulder periods (i.e. between low and high seasons). They predominantly travel as singles and whilst they have a higher propensity to book packages and travel by coach, culture is particularly important and they like to learn something new on holiday.
- Country Living 10% – one of the most affluent groups in the UK and mainly comprised of older couples. This group are likely to visit a garden, museum, heritage or cultural attraction.

In terms of a potential market, combining a trip away with a trip down memory lane is one of the fastest growing travel sectors. For example, one million people visit Scotland each year, motivated by their ancestral activities and generating £730 million for the economy, according to tourism authority VisitScotland. The global television phenomena, *Who do you think you are?* alongside the rising popularity of DNA-based ancestry has also sparked fresh interest in genealogy. And the digitisation of archival records such as parish registers and ubiquitous web access has made researching family trees a lot easier and more accessible.

As an international market it is particularly relevant for attracting American visitors, with genealogy reportedly the second most popular hobby in the USA. However, whilst international visitor numbers are predicted to slowly recover; domestic tourism is set to flourish due to the uncertainty surrounding travel restrictions in the wake of Covid-19.

⁸ Market Characteristics of Dorset Holiday Visitors, Dorset Tourism Association



Research undertaken by Visit Scotland ⁹suggests that key benefits of seeking to grow this audience are that:

- Ancestral visitors tend to stay longer than average.
- They are more likely than average to visit out with the peak summer months of July and August, thus helping to extend the season into the shoulder months.
- They will visit areas related to their own family history rather than remain in a single location, thus spreading the economic benefits.
- They are more likely to develop a strong emotional connection and are therefore likely to become repeat visitors.

As such, Ancestry/Genealogy Tourism is a segment of the visitor market that is worth working towards developing by promoting the archives as a resource that can be drawn upon to bring family narratives to life, encouraging people to plan beyond day visits e.g. revisiting places of celebration such as honeymoon destinations and family holidays.

Ancestral services case study – Essex

[Connections](#) is a tourism project collaboration between 13 England destinations that features authentic cultural, heritage and ancestral tours of England.

Essex Record Offices features on the site showcasing its paid for customisable Ancestral services, which include one-to-one guidance from archive experts, help with reading difficult handwriting, hiring a dedicated researcher to delve into personal connections, search room tours and specialist talks and workshops tailored to the needs of groups.

There is a clear role for the JAS to play in supporting ancestral visitors who want to do genealogical research as part of their visit, both before they travel and also by providing a

⁹ <https://www.visitscotland.org/supporting-your-business/marketing-toolkits/ancestral-tourism>

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warm welcome at Dorset Heritage Centre and/or signposting people onto the other local records offices, libraries and family history societies as relevant.

Visit Dorset is focused on helping to curate experiences and geared towards helping visitors build an itinerary via the planner function drawing on things to do and what's on section of the website. JAS could support this approach by advising on additional content that may appeal to those wishing to create personal itineraries that take in historic churches, civic buildings and memorials, which would also be beneficial in contributing to the growth of a more dispersed local pan-Dorset heritage experience. In this way the JAS can contribute to boosting off-peak tourism, attracting audiences who want more than just the beach, non-family audiences, and those seeking a to connect with heritage at a more individual level.

The consultation process revealed that there are opportunities for the JAS to demonstrate value to the tourism team within BCP and also Visit Dorset, which is hosted by Dorset Council. This would entail providing imagery and other content for web-based articles and social media activity, helping to develop the narrative for Dorset's' broader heritage. This might best be approached by working with the two tourism teams to understand the popular themes and stories and then reviewing the JAS collection content to identify how the records and images held can help to enhance the narrative. Additionally, the Visit Dorset website gets 2.2 million hits per year and is valued as an information resource by both visitors and residents; it is recommended that this established, highly visible platform is updated to include information to help promote Dorset History Centre under the 'Things to Do' section with a summary of the collection gems and links that provide information on how to trace your family history. Future events and exhibitions ought also to be featured.

Raising awareness about the content of the collections amongst officers with responsibility for tourism could also act as a stepping stone to building relationships with attraction operators, particularly where there are relevant materials that might enhance the visitors understanding of the heritage of a specific site.

An example of an opportunity that could be developed, which would contribute to the heritage offer for visitors, is [Tyneham \(evacuated world war village\)](#) which Visit Dorset have acknowledged as an important heritage site within the itinerary feature of the website. To help improve the profile and enrich the visitor experience it is understood that the interpretation and exhibitions need updating. Prior to Covid-19 early discussions had taken place regarding a collaborative funding bid between the tourism team, countryside service who run the site and the JAS. Such an approach would draw on the heritage content within the archive collections helping to build a better picture of what village life used to be like and how the village was evacuated during WWII.

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Firstly, though there is a need to address the perception that the volume and hence value of ancestry tourism is not significant enough. Much genealogical research is now done online via Ancestry or Find My Past, so the 'added value' offer is coming to a place itself, either for the more detailed research into records that aren't digitised, or to simply experience the place in which ancestors or historical figures like Hardy inhabited.

Intra Dorset travel is also a significant component of the visitor economy. This near-by resident market provides multiple opportunities for promoting events and exhibitions to encourage off-season travel.

The need to maintain local distinctiveness when the sense of place has been disrupted by the recent LGR process was also highlighted at number of times. This poses opportunities to draw more extensively on the JAS collection to celebrate the identity of the historic towns and for JAS to contribute content to digital technology apps that offer self-guided tours, which would appeal both to visitors from outside of Dorset and also help the local community learn more about the place in which it lives.

3.5.2 Younger people and ethnically diverse communities

One of the challenges Dorset faces is that its population has proportionately fewer younger people than is typical for England, reflecting in part its appeal as a retirement destination¹⁰, which will lead to a potential vacancy gap of up to half the current workforce in the next 15 years. This means that there will need to be a focus on boosting talent attraction and retention, by providing an exciting proposition to work, progress and live well in the region.

A number of foundation blocks have been identified for improving economic prosperity as part of the Local Industrial Strategy and of particular relevance to this review is Place: Making Dorset a place of creative and cultural excellence: Celebrating Dorset's cultural assets and the creativity of its people, representing this with a strong brand for Dorset which reflects the ambition and opportunity within the region. Given the challenge set out above and the strategic intention to capitalise on Dorset's cultural assets, the JAS has a role to play in preserving and showcasing local heritage in such a way as to ensure its relevance to younger generations, diverse communities and domestic migrants.

3.5.3 BCP Council's corporate records

¹⁰ [2019 Local Industrial Strategy summary](#)

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BCP is undertaking an ambitious programme to convert the whole council to a ‘digital-first’ organisation with complete connectivity across council services and records. This will enable residents to access any combination of services seamlessly and have a two-way dialogue with the council, accessing physical services locally when needed. Proper management and coordination of the corporate record is at the heart of this, both to provide prompt and appropriate access to information, but also to significantly reduce accommodation costs by rationalising paper records and reduce operating costs by properly managing the digital record. Good digital management will also reduce the Council’s carbon footprint.

The JAS can provide knowledgeable support to this move through its knowledge of records management, GDPR, analogue and digital preservation of records and providing customer service. Depending on the resources made available to it the JAS can:

- Advise on the retention schedule that governs how long records should be retained and their destruction date or archive transfer date
- Provide a records management service if additional professional staff and records storage accommodation (lower specification than archival accommodation) are provided for this purpose
- Provide a long-term home for those analogue records deemed of long-term historical value e.g. Council minutes
- Provide digital preservation services for digital records although this will require additional resourcing to that currently being provided
- Deliver the mass digitisation and online access of particular record types that are heavily used by the Council e.g. deeds, adoption records

One example of the impact of not managing records was given during this review. Within the strategic planning function at BCP there is a frequent need to refer back to historic plans in relation to new building developments. The majority of which were deposited at DHC over two decades ago, but this is not common knowledge amongst relevant officers. So, it is not unusual for project managers to commission architects to redraw these plans, with both time and budgetary implications. Furthermore, it was suggested that commercial partners writing reports about the history of development sites don’t use the JAS resources either, which indicates a general widespread lack of profile for the role of the archive collections and staff knowledge in supporting the planning function.

See Appendix 10 for a case study in how West Sussex Record Office has supported its council through records management and other services.

3.6 A note on schools



JAS has delivered successful work with schools audiences in the past. However, this is a very time consuming audience to contact and maintain due to the need to design bespoke content, the difficulty of maintaining relationships with a high level of staff turnover in schools and council education, and the unwillingness of schools to travel. Furthermore, there is already a strong heritage offer to schools provided by the museums and other heritage organisations. Whilst the strategic priorities of both councils stipulate within the Council Plans an aim to enable access to high quality education and improve the aspirations of children and young people it is not cost effective for the JAS to do so. Therefore, it is recommended that the JAS focus on the audiences described above and that future additional education and learning resources are only likely to be produced as the result of externally funded project opportunities.

3.7 Recommended enabling actions

The JAS needs to undertake a range of actions to place itself strategically and develop the necessary profile to encourage these audiences. Below are the recommended enabling actions along with examples of implementation.

3.7.1 Connect with key strategies

This is a potentially a very propitious time for reviewing the JAS's role and relationships. There are numerous strategic developments under way with which the JAS should connect. These include:

- Dorset Council's Digital and Change Strategy – moving the Council to a fully digital organisation
- Ensure JAS is involved in a meaningful way with the planning and actions for the move of BCP to a 'digital first' organisation and is included in the resourcing for this work where additional resource for JAS is necessary.
- BCP Council's Cultural Compact (see below) – under development. The review found evidence to suggest that more needs to be done to secure input into and recognition for the role of the archives within the BCP evolving Cultural Compact work.
- The Arts Development Company has recently been commissioned to write a new Cultural Strategy, which Dorset council will then adopt. The JAS is on the advisory group for this work and will be a key delivery partner.
- Both Councils are currently refreshing their Joint Health and Wellbeing Strategies and there may be opportunities for the team to align work to support the priorities in relation to living well and ageing well.
- Dorset Tourism Association is seeking to co-ordinate a pan-Dorset arts and culture strategic bid, involving the Arts Council England National Portfolio Organisations. The focus will be on Placemaking and Cultural Infrastructure with an ambition to create 'off peak jobs' and extend the economically active day beyond 9-6.



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- Exeter University's emerging creative strategy - Encourage contacts at Exeter University to include heritage and specifically the JAS in the development of the strategy
- Bournemouth University's BU25 Plan

BCP Council's Cultural Compact

The Compact is under development and will draw together partners from across government, culture, business and higher education in a strategic cross-sector partnership driven by a shared ambition for culture and place. A compact structure links arts and culture with broader strategic plans for local social and economic development and also enables partners to join capacity and leverage existing and new resources to strengthen the local cultural ecosystem and deliver the aspirational changes. This review has identified that there is a danger that the contribution of the JAS may be overlooked in the work to develop the [Cultural Compact for BCP¹¹](#). If this occurs the service will miss out on key opportunities to collaborate with other cultural organisations within BCP and their profile will be yet further diminished.

3.7.2 Explain and demonstrate the relevance of the service to key stakeholders

- Support those officers in both DC and BCP who are likely to need archival documents to better understand what is available, where it is held and how to access it easily.
- Work with the respective tourism teams to identify how the records and images held can help to more generally enhance the existing visitor-facing heritage narrative.
- The role of the archive service as a supporter and enabler for other departments work needs to be fully documented and recognised.

3.7.3 Maintain and grow relationships

- Further consolidate the relationship with ADC by meeting once a quarter to update and identify opportunities. This ought to lead to actively developing projects and funding bids that will allow the organisations to reach out together to audiences interested in creative arts. An initial focus might be to bring the artistic collections to the attention of creative practitioners.
- Forge stronger links at strategic level with Visit Dorset, the Destination Management Board for Bournemouth, Christchurch & Poole and the Dorset Tourism Association to fully explore how the archives could make practical contributions to evolving campaigns.

¹¹ See p13 of <https://bcpculturalcollective.co.uk/wp-content/uploads/2020/02/BCP-Cultural-Enquiry-Report-VF.pdf> 'A strong and varied Heritage offer' does not mention of the joint archive service

Also p26 Heritage Innovation where Poole Museum's digitised collections are included but the JAS's are not

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- Build relationships with Section 106 officers to ensure there is an integrated approach to placemaking that draws on the existing heritage. Seek to negotiate a commitment to ensure that every new housing estate in Dorset has interpretation and street names of relevance to the history of the site.

3.7.4 Promote the profile of JAS

- Promote the JAS as an internal service to council departments and move away from the 'History Centre' label to relevant terminology e.g. Records Advice Service
- A more proactive approach needs to be taken to gaining sign-up for the archives newsletter, particularly amongst Councillors and senior-decision makers via targeted messages highlighting the purpose and benefit of receiving information from the JAS.
- Ensure that there is sufficient content in a JAS e-newsletter to engage academics and that they are on the mailing list
- Approach all relevant Council staff and members to invite them to subscribe to the JAS's newsletter, as GDPR precludes JAS independently putting their contact details on its list.
- Your Dorset' magazine, which is published 3 times a year and goes to 180,000 homes in the area is an ideal mechanism for the JAS to reach a broad base of residents. A rolling programme of features should be developed to showcase highlights from the collection or new acquisitions, inform residents about forthcoming exhibitions that the archives is involved in, and more generally inspire people to take an interest in the role of the archives as a repository for the written and recorded memory of Dorset e.g. the recent collecting of 'corona diaries'¹².
- BCP also produce a magazine for residents thrice yearly, which is delivered to 183,000 homes. A similar programme of content as suggested above could be proposed in order to reach out to and inform BCP residents about the full range of the JAS offer.
- Ensure JAS is clearly signposted in the University careers offer as a location for student placements.

¹² <https://news.dorsetcouncil.gov.uk/dorset-history-centre-blog/corona-diaries-project/>



4. Balancing digital and place-based services

The JAS should move to primarily digital services, but retain place-based for high-quality interactions with collections and staff. JAS's previous work and its installation of the Epexio system means the JAS is well placed for this digital shift. Providing services to Dorset and BCP councils should be a core element of the digital offer.

4.1 Overview

Analysis of the 2018-19 CIPFA Statistics for Archive Services¹³ shows a marked pattern for JAS's visitor profile. If an analysis is made of all the 'non-metropolitan' services listed in the CIPFA stats, of the 41 that provided data on physical users of the service (onsite and exhibitions plus learning events) JAS had the tenth lowest figures at 8,627 compared with an average of 21,526 (Appendix 8).

JAS's much lower performance in physical user numbers compared with other services can be explained by several factors that isolate the service:

- Not being located in the highest populated area for the 'county' e.g. 483k for Bristol¹⁴, 21k for the town of Dorchester¹⁵ and 215k for the Dorchester postcode area¹⁶
- No exhibition facilities like those of Norfolk or Surrey
- Not being co-located with related services e.g. York within a library, East Riding with a museum and library
- Basic public spaces of the 'lecture room' and smaller 'education room', unlike The Keep's extensive bespoke education suite or Essex's bespoke lecture theatre and several other rooms with full conference facilities.

¹³ <https://www.cipfa.org/policy-and-guidance/publications/a/archive-services-statistics-201819-actuals>

¹⁴ <https://www.bristol.gov.uk/statistics-census-information/the-population-of-bristol>

¹⁵ <https://apps.geowessex.com/insights/AreaProfiles/Town/dorchester>

¹⁶ <https://www.plumplot.co.uk/Dorchester-population.html>



However, lower user numbers are not just a function of an inefficient location. They can also be positively explained by online activity. Online usage (website, online catalogue and commercial providers like Ancestry) JAS is one of the higher performing services

Number of web page impressions

Source of web page impressions	JAS	Average for all CIPFA non-metropolitan respondents	Median	JAS's ranking
Website	149,192	269,851	98,817	15 th highest out of 34 respondents
Commercial provider	3,059,904	2,498,799	540,825	6 th highest out of 23 respondents
Online catalogue	445,221	359,908	215,116	9 th highest out of 32 respondents
Total	3,654,317	3,552,927	823,472	7th highest out of 36 respondents

The JAS has a strong comparative performance for providing online access to collections and catalogue information. It was one of the first services to place material with an commercial online provider (Ancestry) and has been adding content since so that all of its key collections that contain a lot of names can now be viewed on Ancestry. So many of the routine genealogical enquiries that would have been traditionally answered in the searchroom can now be answered by the user doing their own online research.

Also, it is an anecdotally well-known phenomenon that the more material a service puts online the direct enquiries to the service but those that the service receives are more complex and search more deeply into the collections and staff knowledge. Therefore, having a lot of online traffic indicates that the JAS has been effective in placing a lot of material online to answer routine enquiries, reduce staff time and provide a higher quality of service to more engaged users who come onto site. So the JAS has already been pursuing a policy of increasing user self-service online to ensure face-to-face contact is undertaken where necessary, an approach both councils are now seeking to roll out across all their functions.



However, the JAS's website performance is less strong, being well below the average although above the median. The stats are before Epexio was used. Like most CalmView users, their search engine optimisation has hampered by the old technology. The previous catalogue search wasn't crawlable by Google and Bing search engine 'spiders'. However, the on-going installation of Epexio enables deep crawling which will support organic search and thus push up the website usage.

There are a number of competing factors that influence JAS's accessibility for audiences and design of service provision:

- How to reach audiences spread out over a large geographic area
- The constraints on sending staff to individual localities given the small number of staff
- Meeting user expectations with regards to online content and functionality, particularly when compared to the digital behemoths like Amazon
- Creating services and access methods which are relevant and workable for diverse audiences
- Resourcing the creation and maintenance of digital resources
- Balancing delivery to ensure equity of access across BCP and Dorset

Currently physical access is not equitable for BCP due to the 30 mile trip to Dorchester, lack of JAS staff to establish a regular physical presence in the area, the very low profile of the History Centre in the BCP region and a perception amongst BCP council staff, other than the library service, of JAS being a passive service that simply receives records.

Digital service provision provides a substantial part of the solution to the physical inaccessibility of JAS. Furthermore, this is the ideal moment for JAS to move towards delivering truly digital services. There is a range of robust technologies to enable diverse services, most users expect to be able to engage with service providers remotely for at least some services, and there is an ambitious shift in both BCP and DC to comprehensive and connected digital service provision as the default, augmented by physical services as needed.

4.2 The balance between digital and place-based services

Both BCP and Dorset Councils are implementing digital shifts to digital services whereby 'we come to you' rather than 'you come to us'. The pandemic has amplified and made faster the shift towards digital services across both the archive sector and local government. In line with this cultural and technological shift it is recommended that the JAS prioritises digital approaches in its service design and delivery with analogue services being reserved for high quality interactions



to identified audiences when a digital equivalent is either not possible or inappropriate e.g. supporting researchers who wish to work directly with original material, some mental health services.

4.3 Digital service provision

This section has been developed in light of the Audience Agency report 'Digital Content Research Findings 2017'. Its research found that potential users, other than experienced researchers, value content curated around themes, places and people with supporting narrative as a reassuring way to access the collections i.e. 'audience-centric' content rather than 'service-centric'. Content that would be welcomed included digitised photographs, maps, film and audio recordings. They also wanted amenable online guidance on accessing and using the collections and services both physically and digitally.

The JAS digital services need to have the following qualities to be effective:

- Clearly relevant to target audiences and easy to use
- Dovetail into, enhance and are enriched by other council services
- Transform use of JAS in numbers, demographic diversity, geographical spread and public awareness
- Sustainable financially and in terms of skills and personnel

4.4. Providing digital services for internal users

The JAS can work with DC and BCP as an enabler to support efficient business operations and seamless pan-Council services for residents.

Dorset Cabinet Minutes of 6 October 2020 states that 'resources [are] required to manage our legacy of paper records because services have significant volumes of paper around them in offices'. Likewise, the 'Dorset Workplace'¹⁷ transition needs to be supported by strong

¹⁷ <https://moderngov.dorsetcouncil.gov.uk/documents/s20914/Dorset%20Workplace%20V7.pdf>

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management of corporate records both digital and analogue. BCP has ambitious cutting-edge plans for a transformation to a digital-first organization and effective management and accessibility of the corporate record will be fundamental to whether it works.

It should be recognised by both councils ***that it is vital that good digital preservation practice is built into managing digital records from the point of their creation*** e.g. creating a record in a format that is difficult to preserve creates significant problems and unnecessary expense at a later date. The JAS is a leader in digital preservation for local authority records and the Councils should leverage this expertise for their own long-term benefit to ensure their records are efficiently accessible and trustworthy in years to come.

The need for effective digital preservation of council records was eloquently summed up by a senior council officer for this review – ‘Archiving is a discipline which needs expert staff and continues to be relevant [since our department moved to digital systems]. Initially there was no common data standard which inhibited data migration to other systems so people were stuck with one supplier. Most IT contracts are for 5 years but the electronic data needs to persist for [decades] and long after the current buildings and political organisations that have gone. Digital is not forever, it is not free and it has a climate impact as well as having long term access and survival issues. We have never thought about the back end of how we keep the records long term and provide access and remain legal and useful for the [the long term].’

Also, sometimes poor records management has resulted in ‘near misses’ (as described by one interviewee) with regards to compliance with FOI requirements.

The partial digitisation of DC adoption records and their inclusion in JAS’s digital preservation system (Preservica), has clearly demonstrated how such work enables the easy control and accessibility of council records both to the councils and to chosen users e.g. people who have been adopted.

It is recommended that JAS offers the following services to the Councils based on what the JAS currently holds:

- Efficient access to historical documents now held at JAS
- Advice on managing records with regards to digital preservation
- Answering queries from the public on their behalf from the records held by JAS
- Providing easy access to sources of content which users can leverage in their own work e.g. images for promotion or exhibition

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- A separate part of the website appropriately badged to appeal to internal users i.e. not The History Centre

Even more important is that JAS is able to provide access to corporate documents with long-term value as the council workforces shift to home working. Also, this will pull the JAS into line with other council services where frontline services are provided digitally. However, it should be recognised, as with other council services, that the physical services need to persist where appropriate to connect people with heritage and accommodate user needs notably running the searchroom and doing analogue outreach activity.

The JAS internal services must be clearly signposted on the Councils' intranets and preferably badged separately from 'The History Centre' e.g. the Records Advice Service. The offer should overcome the prevalent misconception that JAS is just a passive recipient. It should present the JAS as an expert adviser and enabler of efficient working and developing online services to residents, by offering a range of services, the ready accessibility of records that are put with JAS, and case studies of work to date plus suggestions on how a department could work with JAS and recommendations.

Possible pilot activities

1. Support Legal Services and Records Management at Dorset Council in the implementation of a new case management system particularly around organising information, filing protocols, choosing file formats, archiving content of long-term value with JAS, providing intuitive and known channels for legal staff to access material held in JAS systems, large scale digitisation and online access of content with long-term value e.g. deeds and maps for building development and highways enquiries, and supporting the cultural move from analogue to digital. Legal needs a seamless digital flow between its systems and JAS's.
2. Continue work with Dorset Council Children's Services to support the move to a digital service and notably where service clients can access their own case records and have a dynamic, two-way relationship with Children's Services whilst observing GDPR.
3. Complete the digitisation of DC Adoption Records with additional resourcing to finish the digitisation and provide an online portal for authorised DC staff.
4. Digitising plans for BCP



4.5 Digital services for external users

External user groups will each have their own needs but there are a range of services that JAS should provide that in combination will fulfil those needs. This section lays out those different services and suggestions of how they can be met using digital technologies including:

- Accessing collection content
- Fulfilling a sense of place and interests of residents in their locality
- Accessing JAS's services
- Enabling users to dynamically interact with the collections
- Skills development
- Enabling residents to access councils' services
- Connecting JAS collections to other heritage collections in Dorset
- Access JAS collections and services via other online providers
- Collecting new collections

4.5.1 Accessing collection content

- Online image bank with purchasing facility for prints and downloads. This should start with locations and events to engage local residents in individual localities at distance from the History Centre. This content would be straightforward to produce as JAS has tens of thousands of digitised images so the work would be selecting images (around 8000 to start with), adding the metadata and creating the content. Copyright will be problematic for some collections e.g. Frink. Creating image descriptions could be one of the JAS's first remote volunteer projects.
- Curated content through themes, changing exhibitions, blogs – again using existing digitised images and repurposing the existing staff output of blogs initially
- Whole digitised collections behind paywalls – possibly starting with the creative collections but also local history that is of interest to academic institutions. This is a long-term plan that will require further research to assess its viability.
- Name-rich documents digitised and behind the Ancestry paywall already e.g., wills, Civil Registration, parish registers, prison registers.

4.5.2 Fulfilling a sense of place and the interests of residents in their own locality

- Digitisation of location specific content e.g. maps, planning registers, photos
- Creating online galleries with material from the collections and narrative focused on individual localities
- Developing a location-specific project akin to 'Know Your Place'¹⁸ or East Riding's 'What was here' walking app¹⁹ where a user can hold up their phone to a location and be

¹⁸ <http://www.kypwest.org.uk/explore-the-map/>



presented with historic photographs and maps of that location and the opportunity to buy a print or can explore content 'at home'.

- Social media activity and e-newsletter

4.5.3 Accessing JAS's services

- Online guides and videos to using the records
- Online events diary connecting through to content and booking system for all events
- Online booking for using the searchroom and reserving documents

4.5.4 Enabling users to dynamically interact with the collections

- Capacity to capture reminiscence – perhaps linked to location-focused content or exhibitions
- Creation of remote volunteer cohort with dedicated online login to work and events.

¹⁹ <https://www.eastridingarchives.co.uk/archives-online/#er-arc-online-app>



Remote Volunteering case study –Suffolk

[Suffolk Archives](#) have developed a range of opportunities available to volunteers. These are arranged to appeal to people with differing commitment levels and offer an opportunity for everyone to get involved:

- those that just have a few spare minutes in the day,
- those who want to want to volunteer more regularly
- those that want to get involved in a more complex project.

There is also a sub-section for people that would like to get involved from the comfort of their own home.

- Online workshops and courses – free taster courses and paid longer courses
- Create content that users can manipulate e.g. book mark in their own account and create their own albums or ‘libraries’ of content, download, upload comment /memories and link through to other content
- Social media activity including blogs, Twitter and Facebook

4.5.5 Skills development

- Online courses for students and researchers in how to use collections and research skills such as palaeography
- Case studies/films and guides on specific areas of popular research e.g. house history

4.5.6 Enabling residents to access councils’ services

- Access to key records that the Council uses and are held by JAS, and can be made publicly available e.g. planning documents – possibly behind a paywall – would need to be researched
- Links to relevant services e.g. mental health, culture and heritage, planning, archaeology, ecology
- Online purchase of copies of key documents e.g. wills, maps
- Use the JAS as a friendly and engaging service for nudging council service users online to then use other council services

4.5.7 Connecting JAS collections to other heritage collections in Dorset

- Clear signposting to archive collections held elsewhere e.g. Bournemouth library, Christchurch Historical Society and Poole Museum



- A portal for archive and museum collections across Dorset and BCP – need to be researched
- Creation of joint resources for historical research with BCP libraries and other local bodies?
- Work with each service department to identify the key records they would like to be able to access digitally and long-term and from that develop a long-term digitisation priority list and workplans
- e.g. walking app – e.g. the East Riding App
- Place based heritage information for use by visitors
- Redesign website to be visually engaging and clearly point towards key offers such as content for residents in their locality, academics, genealogy content.
- Clearly signpost JAS within the council websites

4.5.8 Access JAS collections and services via other online providers

- Museum Crush is Culture24's collaborative storytelling platform, which is dedicated to sharing the many curious and compelling objects found in museums, galleries and heritage sites. The website helps the public to explore the rich treasures they contain and also sends out a weekly digest to 13,000 + subscribers. Not only does it seek to inspire the digital browser, but it encourages would be visitors to plan their next cultural excursion. The JAS might capitalise on this popular established platform to proactively share gems such as the Dame Elisabeth Frink silverware collection that will soon be on display at the Dorset History Centre.
- Add content to HistoryPin²⁰
- Providing imagery and narrative for the Visit Dorset tourism website as well as linking Visit Dorset into content at on the JAS website and digital adjuncts such as a walking app or Know Your Place content

4.5.9 Collecting new collections

The JAS must also be able to fulfil the needs of depositors. Inevitably modern collections are primarily digital so the JAS needs to be able to accept, manage and provide access to digital collections through its established digital preservation capacity. The JAS will also need to have the capacity to support depositors in preparing and transferring their collections as well as raising awareness with record creators that digital records are as important to the historical record as their analogue predecessors.

²⁰ <https://www.historypin.org/en/explore/geo/37.77493,-122.419416,12/bounds/37.681112,-122.495709,37.868629,-122.343123/paging/1>



4.6 Recommended channels for digital engagement

JAS will need to extend its current digital services and add new ones. These are analysed in detail in Appendix 9 and summarised here. They can be tailored to focus on the audiences recommended in Chapter 3. They should also be linked through where logical to encourage a visitor to the site to move through a 'ladder' of engagement from casual visitor to developing a defined interest to researching using original material e.g. alongside the exhibition offer links to guides and workshops on using collections and research skills. By adopting an approach that promotes the value of physical collections alongside digital access it is possible to connect local people with the delight of the collections through showing and explaining relevant material.

In marketing terms there are four communication steps that would help to encourage people to make greater use of the digital resources available and potentially also visit the History Centre in person:

1. Descriptor messages to INFORM – as mentioned in earlier sections of this report, residents need to have an awareness of the richness of the archival heritage available for them to access.
2. Differentiator messages to PROMOTE – potential audiences need to understand how accessing an online exhibition or virtual talk will provide them with an enhanced understanding of a topic/person/landmark.
3. Connector messages to INSPIRE – the content of, for example, the exhibition or talk needs to relate back to other items in the collection in order to generate an interest in finding out more.
4. Motivator messages to ACTIVATE – finally there needs to be a clear call to action to access more in-depth online resources or to visit the Dorset History Centre . This needs to address any perceived barriers e.g. distance, unfamiliarity with accessing records.

The recommended digital channels are listed below. Appendix 9 suggests which audiences they should initially focus on to provide direction of the development of content. However, in the long-term they should be available across the spectrum of the JAS audiences. Chapter 7 identifies when these should be implemented (1, 3 or over 5 years) and outlines resources

Accessing collection content

- Image bank of photos and maps of locations, landmarks and local events searchable by location with downloadable and print options
- Large scale digitisation of collections based on themes and locations, starting with 'creative' archives
- Digitisation and online access to document types e.g. deeds and maps

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- Online exhibitions to create accessible ‘tasters’ of the collections
- Links to catalogues and collection information

Accessing JAS services

- Online guides to using collections ranging from basic to advanced
- Videos and online workshops for research skills
- Events diary with online booking and payment
- Curated blog content
- JAS newsletter
- Social media
- Online events

Enabling users to dynamically interact with the collections

- User account to book mark content, create albums of content,
- Users add their own memories
- Online volunteering
- Walking app/ ‘Know Your Place’ facility

Skills development

- Education and learning resources

Connecting JAS collections to other heritage collections in Dorset

- Feed into the library and museum catalogues
- Joint exhibitions
- Links from Visit Dorset website

Access JAS collections and services via other online providers

- Profile and links on the Councils' intranets
- Content for digital reminiscence and Mental Health projects
- Reciprocal links with other heritage/ cultural bodies websites
- Creation of heritage itineraries for Visit Dorset
- Provision of imagery and content for Visit Dorset
- Linking residents with other council services
- Offers of bespoke help and tours on Visit Dorset

Collecting digital collections



- Digital preservation system
- Advice on managing records through help pages, You Tube videos and named email contacts
- Dedicated internal service pages for officers highlighting what the JAS can do for internal departments

4.7 Recommended enabling actions to support digital service delivery

It is recommended that JAS undertake the following actions to support greater digital delivery:

- Develop a strategy for digital service delivery with attached action plan, informed by this review and the Councils' digital transformation plans, and responsibilities
- Continue to Phase 2 of the Epexio installation
- Research the potential for developing a 'walking app' (e.g. [the East Riding 'What was here' app](#)) or '[Know Your Place](#)'-style resource
- Provide training to staff and then assigning them related tasks to enable them to develop and apply skills and engage e.g. social media
- Extend digital storage capacity including for Preservica
- Increase digital preservation staffing capacity
- Give the JAS access to each Council's asset register so the JAS can identify and support the care of information assets.

The JAS has already created a digital working group which is actively looking at some of the digital delivery recommended in this review.

Place-based services

The rationale for applying place-based services

Place-based services are those services which are delivered at a specific physical location. They can be considered more resource intensive than digital delivery because they require maintenance and provision of an appropriate physical setting and often require the active participation of a staff member with the service user. Place-based services are also more restricted in the user offer - they make contact with a smaller number of participants than digital provision, they are location specific and are time specific.

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However, they do have advantages over digital delivery. They can provide a very personalised and highly experiential engagement with the service, particularly when involving a skilled staff member and/or original material. They may provide the only direct access to collection content that is not digitised. Also, when the location is appropriately chosen it can reach new audiences and a much high footfall than at the History Centre e.g. local libraries.

To ensure sufficient reach and engagement this review recommends digital service delivery as the base method for connecting with audiences and physical delivery as a tool for tailored service delivery. However, it must be recognised that it is through physical contact with collections that all users have the most fulfilling and memorable experience - touching history is a unique and visceral moment. Interestingly, the Audience Agency report showed that the JAS's Dorset History Centre's email newsletters (distributed between Oct 2016 and March 2017) show an average open rate of 44%. This is extremely high when compared to general benchmarks and indicates that subscribers are loyal readers. Usually the most popular link in each newsletter relates to an event or open evening at the archive, illustrating the importance of physical events to audience development

So place-based services should be judiciously chosen to have maximum impact in terms of engaging individuals and communities with the JAS collections, and fulfilling the Councils' corporate strategies. They should also maximise the engagement of supportive enablers such as relationships that can spread the weight of delivery, alternative venues and mixing the physical with the digital where appropriate (e.g. being able to access the JAS catalogue from a library venue). As with digital services, place-based services are a mix of curated content and user-driven exploration of the collections. Generally users of the searchroom will be self-directed about what content they want to view whilst all other place-based audiences will require curated content.

Strategic drivers for place-based activity

Moving forwards place based services should be strongly guided by the Councils' corporate strategies and, rather than initiatives being delivered in isolation, should be clearly in support of existing plans or in conjunction with commissioning intentions to draw upon wider expertise, build connectivity and ensure that the contribution of the JAS to broader outcomes is recognised.

To help ensure that there is a clear 'golden thread' between the JAS Service Plan, Bournemouth, Christchurch and Poole Council – Council Plan and

Dorset Council – Council Plan 20-24, it is recommended that future JAS Service Plans more explicitly highlight the strategic alignment of each workstream activity or project. This will enable members of the JAAB to better understand how the archives is contributing to

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objectives within both Councils strategic plans and also enable them to more easily identify opportunities and gaps in service provision.

As a new Unitary BCP has stated an intention to develop a number of key strategies, which presents clear opportunities for the future positioning of the JAS as a contributor to a broad range of emerging plans. For example BCP is working towards a Cultural Strategy by December 2021 to increase employment in the area's outstanding cultural sector. They also intended to create a new Tourism and Destination Strategy by May 2020 and to develop a Library Strategy, which reflects the diversity of local communities and aspires to create neighbourhood hubs by December 2020 (these may have incurred delay in development due to Covid-19)

Both Councils are currently refreshing their Joint Health and Wellbeing Strategies and once this work is complete time should be invested in considering whether there are any opportunities to align work to help address the specified needs and support the priorities in relation to living well and ageing well.

Furthermore, in order to provide a more comprehensive assessment of the impact of the JAS work programme, the qualitative or narrative progress updates should be supplemented where relevant to include quantitative data that demonstrates reach, usage, engagement and participation.

Resourcing constraints

Currently the staff available to deliver place-based services is restricted due to personal constraints. The primary delivery channels are:

- The searchroom
- Hosting groups visits to the History Centre including university audiences and site tours
- An annual talks programme hosted by the DAT.
- The Community Engagement Officer is largely the sole personnel resource for delivering place-based support to non-traditional audiences such as those with dementia or suffering mental ill-health and also for reaching out to engage with diverse communities. This limited capacity constrains the ability of the JAS to more comprehensively and consistently support and develop projects that contribute to broader social, health and wellbeing outcomes.

Recommendations for place-based delivery



Place-based delivery will inevitably be restricted and should be carefully chosen to engage target audiences and encourage deeper engagement with collections online and at the History Centre. It should be coordinated with the digital offer e.g. a combined online exhibition and related talk. The 2017 HLF Audience Development and Activity Planning Opportunities report may provide some useful guidance in developing place-based delivery.

Onsite researchers and universities

- The searchroom should continue as a core of the place-based offer
- After the pandemic continue with a six month trial of an appointments-only approach for searchroom users to gauge reaction and quality of service to users. This would free up staff to develop digital delivery
- Reduce the size of the searchroom space in recognition of falling onsite user numbers, increase space of other onsite activity and possibly reduce searchroom staff numbers
- Trial using reception staff to take searchroom bookings, recognising that they cannot field questions about the collections
- Induction sessions for all new users to increase their capacity for self-direction

Localities, museums and library users

- Continue the talks programme but align with the audiences prioritised in Chapter 3 and in collaboration with other cultural venues such as the libraries and museums
- Continue hosting university groups
- Continue hosting site tours
- Provide one touring exhibition for cultural venues, including the universities, a year

Council officers

- JAS staff to visit council officers in their workplaces to develop working relationships and support managing corporate records

Tourism

- Progress the collaborative project with the tourism team and countryside team at DC to enrich the visitor experience at Tyneham Village by drawing on the collections to improve the interpretation and exhibitions.

Health and well-being

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- Build on the reminiscence work that was undertaken by mobilising i-pads loaded with presentations created from archival materials. Previously funded through the Olympic Legacy, consider how this could be resourced efficiently by using volunteers and social care staff to deliver sessions at day centres and residential homes. This will enable JAS to continue cascading the support offer out across DC and BCP.
- Create themed reminiscence memory bags using archival materials for loan working through the library service in DC and BCP.
- Draw on material from Herrison Hospital to engage new audiences, delivering heritage, social and mental health outcomes by taking an approach similar to that of Norfolk Archives in their nationally acclaimed Change Minds project.

Whilst capacity to service these activities is a challenge, they should be considered in terms of the value that they offer to vulnerable groups rather than merely the cost of provision.



5. Income generation

Income generation will continue to come from numerous activities, combining existing and new activities. There is no undiscovered ‘magic bullet’, but moving into digital services does provide new opportunities.

5.1 Current status

JAS has worked hard to generate income over the last decade and cut costs (to secure job posts). Over the last five years it has raised £1.084mn from sources other than the funding councils. This equates to 87% of BCP’s contribution (£1.25mn) to the service or 74% of DC’s contribution (£1.47mn) over the same period (See Appendix 1).

The breakdown of income is as follows (see Appendix 1 for more detail):

	Total 2015-20 £	% of 5 year total
Total from goods and services	177,637	16
Total research income	30,389	3
Total grants income	613,355	57
Renting strongroom or office inc. Museum Officer	234,110	22
Donations (inc. a bequest by instalments 2016 - 2018)	29,054	3
	0	
Total 'generated income'	1,084,544	100

The grants income accounts for 57% of income which is due primarily due to the £384k for the Bankes project. The next highest income source is renting out building space. Goods and



services income is generated from 19 activities. Many of these earn only small amounts of income. The largest earners are providing digital copies, conservation, car parking, lecture room hire, community engagement projects and royalties from Ancestry.

There are several conclusions from this analysis

- Non-heritage activities are vital to income generation i.e. room hire and car parking
- JAS is able at generating grant income and continues to do so. At the time of writing it has raised £50k to purchase further Hardy manuscripts.
- Renting out the conservator's time does generate income but then has to be balanced off against her salary.
- Generating income directly from the collections accounts for a relatively small amount of income – digital copies and Ancestry are the highest earners

JAS should also be congratulated on its energy efficiency measures. It installed photovoltaic cells in 2015 and after converting its strong rooms to a Passivhaus approach the air conditioning was switched off in 2018. These measures have reduced electricity costs by 75% in 2020 compared with 2014 and gas by 33% in the same period.

By leading on the development of a regional consortium to purchase the Preservica digital preservation system, the Service Manager negotiated a 50% discount on the annual licence fee compared with buying a licence as a standalone organisation.

JAS also performs well against other archive services. A comparison was made with the following county archive services that serve coastal counties that are predominantly rural but have major towns and have a strong income generation push:

- Devon Archives – part of the South West Heritage Trust
- Essex Record Office – over the last decade has focused heavily on income generation with staff specifically tasked with developing income streams
- Northumberland Archives – moved into the refurbished Woodhorn Mining Museum c. 2006 as part of the Woodhorn Trust until taken back into direct local authority management a few years ago. When it was moved into the museum there was dedicated investment in copying/digitisation assets with a view to creating an income stream from reproduction

Analysis of the CIPFA statistics²¹ in Appendix 6 demonstrates that Dorset matches these comparators in terms of how much income it generates as a proportion of total revenue income

²¹ Annual statistics on local authority archive services issued by the Chartered Institute of Public Finance and Accountancy <https://www.cipfastats.net>



and total revenue expenditure. It should be noted that it is not possible to determine the precise components of a service's individual CIPFA figures but nevertheless they do provide grounds for broad comparison.

Although JAS does not have the capital investment of digitisation equipment or the attractive public spaces of Essex it has nonetheless managed a similar level of income generation as a proportion of revenue income and revenue expenditure.

Research for this review revealed that JAS has exploited all of the obvious income sources as well as investigating others that were revealed to be impractical.

5.2 Future income generation - overview

The analysis of this report indicates that the JAS has already identified and leveraged all the existing opportunities for income generation. It has also researched and rejected other methods as not practical. The JAS is always on the look-out for income opportunities and willing to try new routes e.g. crowdfunding in 2017 £8000 to complete the digitisation of the archive of local photographer Graham Herbert. Its performance is comparable with other services that focus on income generation.

Future income generation will require the maintenance of successful income generating activities underway plus the creation of new opportunities through developing digital services, expanding staffing. Any future income generation needs to be a mix of generic activities (e.g. space hire) and heritage specific.

Income generation must be focused. Many local authority services have been forced to waste personnel resources on trying to extract income from essentially unworkable or unprofitable schemes such as charging depositors. The JAS should have a coherent and restrained selection of income generating activities that relevant to its core purpose and strategic plans (e.g. online image bank) or are easy to administer (e.g. space hire). In all cases ahead of implementation there should be market research and financial assessment to decide whether to follow a course of action and supported by a commercial manager where appropriate. There should also be an options appraisal as to whether the time spent generating commercial income could be better spent on grant applications, for which the JAS has a good track record.



An analysis was undertaken of the income generating activities undertaken by a number of archive services to identify possible activity. Each activity was then assessed for its suitability to JAS's context.

The recommendations around income generation have been identified on the basis of the following criteria:

- They are feasible in relation both to stakeholders and logistics
- They align with JAS's purpose and collections
- They have the potential to generate income

However, some will require investment to realise an income stream.

5.3. Recommendations for income generation

5.3.1 Current activities to be continued without significant alteration

It is recommended that JAS continue the following activities as they are because they are in place, easy to administer, and generate reasonable income or provide a service that a user would reasonably expect:

- Rental of accommodation with a review of rates to ensure they are in line with market rates but do not deter tenants; clear marketing information on the website about room hire including pictures, rates and services e.g. projection equipment (as per Essex Record Office); direct marketing of room hire to obvious groups e.g. U3A.
- Car parking
- Grant applications and donations on a project basis
- Research service
- Onsite photography by visitors
- Reproduction fees with a review of charges
- Selling individual copies of documents notably digital copies
- Conservation services
- Selling archival boxes
- Renegotiate for a better deal with Ancestry when the contract ends in 2025 or use an alternative provider.

5.3.2 Expand existing activities



- A coherent annual programme of paid for outreach events including talks, workshops, history and research skills development, tours, conservation events. There should be a clear strand of online content. They should be tied into wider events and dates where appropriate e.g. festivals, commemoration. The programme will need market research, product development and promotion and include approaches which encourage long-term or multiple engagement e.g. a series of workshops leading to a particular skill level, post-event marketing to encourage participation in future events.
- Support DC and BCP in rationalising accommodation by supporting comprehensive records management action (although BCP does not have the capacity to provide records management itself but could manage this process if assigned a dedicated staff member) and acceptance of long-term historical records.
- Saving other council departments money by providing a mature digital preservation system for them to use. Otherwise departments would have to buy these systems individually at a cost of thousands of pounds per department. (Note that JAS has further reduced the cost of the digital preservation system by purchasing in a consortium).

5.3.3. Develop new activities

- Hosting wedding ceremonies in the lecture room - this was mooted by JAS to the Registrar several years ago but rejected by the (then) Registrar. It has been a useful source of income for other archive services, particularly where the Registrar has been onsite. It is recommended that the room hire is entirely a JAS operation (i.e. separate from the Registration Service). It will require market research to identify the offer and price range and whether it will be profitable and will require upgrading of the room but this would then make the room more desirable for other users. JAS could also create packages that offer a USP around heritage e.g. bespoke family research. It will need specific marketing and management including having capable staff onsite for ceremonies but these ceremonies could be fitted in the diary along with other uses of the room. This would require a commercial manager.
- Film screenings – building on the success of screenings with Wind Rose Rural Media Trust and working with the South West Film and Television Archive at The Box (newly opened in Plymouth) to create destination events with additional spend such as a bar and snacks, and unique attractions such as a speaker or heritage display. Again it would require marketing and event management and could benefit from having volunteer helpers.
- Digital preservation consultancy and provision of digital preservation services and storage - this is feasible but would require focused marketing as potential customers will not realise their need for this service. JAS will need to develop a digital preservation offer targeted at defined markets e.g. solicitors, accounts, architects. It would also require a dedicated digital preservation archivist post at least part time.
- Online image bank for displaying and selling historic images (e.g. York Images <https://images.exploreyork.org.uk/default.aspx>, National Records of Scotland <https://www.scotlandspeople.gov.uk/image-library>). Using an experienced provider

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(e.g. CiT <https://www.citdigital.com/products/#hcp>). Set up would be around £10k with an annual maintenance charge and initially would require around 4000 digitised photographs which should then be increased over time. It would require marketing to get the full value but could be shared with other heritage services and include images from BCP libraries. See Appendix 5 for the case study of Explore York.

- Research digitising selected collections and putting them behind a paywalls

5.4 Engaging with commissioners, personal budget holders and self-funders

Key priorities for Dorset Council commissioners are to offer people control of their personal health and care budget and choice in terms of how they spend that to meet the outcomes in their support plan. The council is focused on facilitation rather than provision and they have a goal to increase direct payment uptake to 50%.

In order to help widen the choice and opportunities available to people, and as part of the 'Better Life' transformation programme, DC is currently developing a framework for providers with the guiding principle that it will be easy to register and be directly commissioned. This is planned for summer '21 and the archives would be eligible to register on this framework. This might then lead to the operations team connecting the JAS with potential new users prepared to pay for supported services. As the transformation programme develops, there will be mechanisms for the archives to better link in with direct payment holders, such as those with an identified need around loneliness and an interest in heritage.

The self-funder market also offers some income generating opportunities and the Inspired by Archives sessions already feature on #HelpandKindnessDorset, which brings together information about all kinds of help and support that are available to people living and working in Dorset.

However, given the unit cost of offering bespoke 1-1 support, it is less feasible to pursue this avenue than to seek to promote group offerings such as reminiscence sessions that can accommodate more people, thus providing economies of scale. There is also the potential to sell pre-packaged services to established groups. And in addition to independent care homes, the archives might usefully connect with U3A; there are sixteen groups in Dorset and for example the Dorchester branch have a Family History Group.



The scope of the review did not include consulting with commissioners within BCP. However, background research flagged up that Dorset History Centre is listed on [‘My life my care’](#), an information and advice website owned by BCP Council, which offers an opportunity to promote day activities to the self-funder market. It would be advantageous for the Community Engagement Manager to make contact with relevant commissioners in BCP to understand what other options exist to directly reach self-funders or those with personal health and care budgets.

5.5 Activities that will not be profitable or feasible for JAS

The following activities are not recommended for JAS to pursue because they are either unprofitable or not feasible. A brief assessment of each activity and why it should not be pursued is provided in Appendix 3.

- Onsite catering
- Civil registration certificate copies with online ordering and pay
- Archival services for privately held collections including surveying, appraisal, cataloguing, answering queries
- One-to-one research support
- Providing baptism certificates
- Large scale digitisation and copying services
- Consultancy - archival skills training, digitisation skills training, oral history training,
- Providing consultancy to public bodies to enable them to meet their requirements to deposit public records
- Charging depositors and searchroom users

5.6 Enabling actions

Income generation is not JAS’s primary role and the service has tapped into to most of the activities it can undertake in its current configuration. To move JAS beyond its current capacity for income generation requires additional capacity and the following is recommended.



3.5.1 Appoint a commercial and customer support manager

Services that have had a successful commercial activity (e.g. Surrey, Essex – both in based in large towns within much more populous counties), and underlying all the proposals is the need for, a knowledgeable commercial manager. There is no capacity within the current staffing to undertake more commercial work and that current staff lack necessary marketing skills, contract negotiation skills and commercial experience.

This role would identify and undertake market research into the potential for particular services and products and then drive the development of these by the Service. The commercial manager would also be responsible for leading on the identification and development of funding bids, with the specialist support of staff members. This role should also support customers using paid for services.

The post holder must have a good track record of income generation within the heritage sector specifically and a demonstrative understanding of working appropriately with heritage collections. A indicative job description is provided in Appendix 4. The post could cover other institutions e.g. local museums but must have a clear remit and capacity to focus on generating income for JAS. It could be a part-time post. At a minimum the post will have to be self-financing.

3.5.2 Create online support mechanisms

Many of the suggestions will require JAS to offer a seamless service so its range of offers should be clearly presented online and provided through online booking and payment. There will also need to be the capacity to offer some activities themselves online e.g. talks, courses, interviews.



6. Collection development & management

JAS has good practice in collection development and management. Core areas for development are the Council's own archival records and establishing a 'Centre for Creative Archives', which could be the lever for much-needed new storage . Rationalisation of existing collections is not recommended as it will not return material increases in storage capacity.

6.1 The role of collecting in a local authority archive service

The purpose of any archive is to collect a coherent, trustworthy record that documents the past of its constituency so that current and future generations may refer back to that record for evidence and information. Local authority archive services are the primary memory bank for the community in their region. As such they support councils to be efficient and compliant, enable democracy, confirm and develop identity both personal and community, nourish learning and discovery, and enrich culture. An archive service represents a local authority undertaking not just a legal duty to care for its own records but an ethical responsibility to protect its community's memory and identify on behalf of that community. Like waste disposal or adult services, an archive is a civic service that benefits society and that local authorities are well-placed to deliver.

In maintaining that coherent record over time an archive is necessarily charged with the responsibility to continue to collect records and grow its collections. To discontinue collecting is to undermine that record and thus the community's ability to recall accurately. Planning decisions, inquiries into children's homes, citizen action around the Black Lives Matter campaign, planning for climate change, honouring the dead of two world wars – these demonstrate that coherent civic archive collections are fundamental to a community's welfare and future.



All archive services face the continuous dilemma of maintaining a relevant archive that must by its nature grow and the consequent demands on resources. Whilst this issue cannot be negated it can be mitigated by judicious collecting decisions, informed long-term decision-making and leveraging the maximum benefit from those collections.,

6.2 Adherence to national standards

The Dorset Collections Development Policy has been developed in line with professional standards, as demonstrated by the award of Archive Service Accreditation.

6.3 Content of collections

6.3.1. Current content

JAS's collections have the classic profile of a well-established local authority record office including local authority, religious, business, charitable, health, education, community, estate, family and personal papers. It provides a coherent documentary history of Dorset over the last millennium. It has notably strengths in the collections of local writers and artists including writer Thomas Hardy, and sculptor Elizabeth Frink.

JAS undertakes collecting in line with professional archival practice. It has an up-to-date collections development policy which is publicly²² available.

6.3.2 Potential future collecting activity

The Collection Development Policy has a clearly defined set of three areas for future collection development namely:

- Business archives, particularly those of the new industries in Bournemouth, Dorset and Poole
- Records of the wider religious and ethnic minority communities
- Records of the arts and creative life including those of artists and of the cultural industries.

²² <https://www.dorsetcouncil.gov.uk/libraries-history-culture/dorset-history-centre/dorset-history-centre-pdfs/dorset-history-centre-collections-development-policy.pdf>



These are appropriate given the nature of social and economic life in Dorset and BCP, the existing strengths of the collection and the resultant gaps, and a professional expectation to collect contemporary material to assure a coherent record of Dorset's history in the future.

6.3.3 Possible future additions

There are several large collections that are due into the History Centre in the coming years:

- Wessex Water, the utility company, size and acquisition date unknown.
- The Echo newspaper - size unknown
- Bournemouth University – c. 2000 boxes

There are also other collection types that JAS should be collecting but are not yet being offered or as yet are unknown to the JAS :

- Three large estates i.e. the Digby Family of Minton, the Sherborne Estate, and the Drax family (although this family is unlikely to deposit)
- Other estates had made major deposits in the 1960s so records of the period since then are due.
- Hospitals – JAS has never been able to engage hospitals in discussions about depositing but they are a vital record (and classed as public records)
- Businesses – the pandemic may well force many business to cease trading so there may be more offered than usual
- The records of Dorset and BCP Councils - this should be an on-going collecting process. It is currently a serious omission in JAS's collections and should be of concern to the Councils that their corporate records are not yet coherently secured.
- Records of creative individuals and organisations to continue to develop JAS's strengths in this area

6.4.3 Rationalising the collections

Rationalisation of collections has been raised by some interviewees as a solution to JAS's lack of accommodation. Rationalising an archive collection requires careful consideration. There are no quick solutions to rationalizing the collections. JAS has already removed the few collections that clearly had no value.



The primary candidates for rationalization are listed below²³. This appraisal analysis has identified those collections with the lowest levels of cataloguing plus those accruing lower value material regularly.

- The records of Dorset County Council and the old District Councils (4553 boxes) which have not been fully catalogued. These were deposited in haste and without rationalization which indicates the importance of rationalising material before it occupies space in the HC storage.
- Solicitors' collections (1000 boxes)
- Large private collections that have not been appraised e.g. Murless, Legg, Fowles, Muntz (around 6000 boxes)
- Private and parish collections which get on-going accruals of lower value material e.g. newsletters (estimated at approximately 500 boxes)

So there are approximately 12,053 boxes that it is reasonable to assume would benefit from appraisal. If it is assumed that each box takes 1 hour to appraise it would require one staff member to work full time for 8.5 years²⁴. If it was assumed that 10% of the content was removed this would free up 1200 boxes of storage space. The JAS requires around 33,000 box spaces to meet its expected storage requirements for the coming 25 years.

It should be noted that any substantial appraisal would have to be undertaken by a professional archivist. Other staff members or volunteers could only be employed on a very limited basis and under the close direction of a professional staff member.

6.4.4 Storage accommodation

Storage accommodation is essentially full with only about three years' collecting capacity. The JAS collections will continue to grow so there needs to be renewed effort to develop new storage accommodation even with rationalization. This was recognised in the 2018 Archive Service Accreditation award when the Assessors made a 'Required Action' that the JAS 'Develop firm plans for the development of further expansion space for archive collections'.

²³ These figures are based on a 2016 report by JAS into the level to which collections are catalogued. It is assumed that if material is not fully catalogued it is a candidate for appraisal because appraisal is a core activity of cataloguing. The box numbers are the numbers of boxes without a full catalogue.

²⁴

Boxes	12,053	Boxes
1 hour to appraise	12,053	Hours
7 hour working day	1721.85714	Days
Assume a 200 working days a year	8.60928571	Years



The next full Accreditation Assessment (which will be before 2024) will be expecting the JAS to have made material progress on the storage issue.

This issue is echoed in the records storage requirements of both councils as part of their current work on much better management of the corporate record with rationalisation and centralized storage of records that will not be retained for the long-term.

6.4.5 Other archival holdings in Dorset

There are other cultural and heritage institutions with complementary collections. The notable collectors include Bournemouth Library (holds the Bournemouth Symphony Orchestra and Symphony Choir), the local museums and Christchurch History Society (holds Christchurch Town documents). Poole Museum passes its archival material to JAS and its collecting policy implies this approach). The JAS and BCP libraries have worked effectively on particular collecting issues e.g. the need to act quickly to collect the Beales collection when the business closed.

The JAS, Bournemouth Libraries and Poole Museum meet quarterly to discuss collecting matters and seek to align collecting activity. However, from the user's perspective archive collections for the region are dispersed across a variety of institutions. The user must trawl each institution's own collection information systems to identify the location of content relevant to their own interests. There is no unified 'search' facility or overarching guide. There is also active resistance to material being held at the JAS e.g. local historians in Poole are critical of local material being held in 30 miles away in Dorchester.

6.5 . Balancing service and affordability

6.5.1 Current state

There is a strong inherent tension between JAS and its funding councils. JAS, like all other council services, has sought to be efficient and is working with limited resources but knows it faces increasing resource requirements in the coming years.

Officers and councillors from both councils have variable awareness and understanding of the JAS with the majority having no awareness. They must balance competing demands for continuously shrinking funds from vital services. Against the priorities of crucial council activity such as children and adults services the JAS can appear 'nice to have' rather than vital.



This tension needs to be overcome by:

- Influential and relevant councillors and officers being directly involved in the key decisions of JAS e.g. collection appraisal, audience development
- Councils recognising where JAS can or could bring value within the wider Council and enabling JAS to deliver that value (e.g. business efficiency)
- Measuring impact in ways that are realistic for JAS e.g. quality of engagement rather than footfall, valuing online/remote engagement as much as onsite visitors (particularly in user numbers), recognising that enabling savings is equitable to income generation
- Recognising that risk management can be delivered by JAS and that it is of value to the councils
- JAS opening up its processes to Council scrutiny and input e.g. major collecting and appraisal decisions, development of new services

6.5.2 How can JAS deliver affordability?

- Ensuring the survival of digital records through advice and provision of digital preservation services for both councils
- Improving discoverability of key records e.g. deeds, adoption records, insurance records
- Reducing council accommodation needs by supporting timely, intelligent rationalization of paper records and prompt transfer of records to be retained for the long-term
- Early intervention of digital records to minimize costs of digital preservation e.g. creating documents in preservation formats

If JAS is enabled to deliver these services through direct support and advocacy from an active governance body and development of a network of appropriate contacts throughout the councils then its profile will rise and it will be able to demonstrate its value.

6.6. Recommendations

6.6.1 Ensure professional management of all Council records is covered in the corporate risk registers of DC and BCP



The risk registers should reflect the importance of managing all Council records adequately and ensuring a long-term corporate record with the support of the JAS, either as a discrete risk or as an explicit action to minimise related risks e.g. GDPR, Infrastructure, Digital Transformation, Corporate Knowledge, Statutory Breach of Duty, Evidence Base, Election, response to Covid-19.

6.6.2 Create a dedicated Council support service

Identify key services relating to corporate records that support business operations and risk management in the Councils such as:

- Management of digital records including long-term preservation
- Housing of analogue records
- Digitisation of analogue records and delivery of digital records to customers
- Handling FOI and DPA questions for council records entrusted to the JAS
- Advising on reducing risk in corporate records management
- Providing long-term secure and accessible storage and management of vital and long-term records
- Supporting information governance and advising on records management design
- Providing basic training to council staff on managing records both analogue and digital
- Develop clear guidance on what records (digital and analogue) should be transferred to JAS and when to support records management functions and business efficiency particularly given the regular churn of staff and the consequent loss of operational knowledge. It will be a much cheaper method of retaining basic but vital understanding for efficient records management.

Departments could be presented with a menu of support services from which they could choose what they required.

Given the similarity of operations within each council using JAS to advise the records management operations, develop guidance e.g. on retention and accept long-term records means that there will be overall significant cost savings as the councils could share those developments around JAS rather than each having to develop their own set of operations.

It is recommended that this service is made available under a badging and online presence that focuses on being a council business support service rather than the History Centre e.g. Records Advice Service. It should also be intelligently linked into other areas of the Councils' internal resources so it is easily discoverable by relevant council officers. The JAS could also promote the service through newsletters, talks, initial advice visits and 'roadshows'.



6.6.3 Be a core service for supporting the organizational transformation in BCP

BCP is undertaking an ambitious four year transformation process to develop bespoke architecture for unifying and revolutionizing business processes. Robust information architecture and governance with dynamic management, use and re-use of data and information will be a foundation stone for this transformation. JAS can be a vital contributor to the building of this architecture in the first instance and then an integral business service in its long-term operation. This in turn will appreciably improve the coverage of the JAS collections by creating an environment in which archival records (analogue and digital) will be clearly identified and managed into the JAS collections. It may also enable JAS to access additional resourcing for collections management.

6.6.4 Strengthen the JAS Acquisition Policy around council records

Include a section which lays out proactive collecting of the corporate records of both funding councils that are to be retained for long-term preservation. This should identify key record series (possibly in an Appendix) to support this activity. The Acquisition Policy should be formally signed off by the JAAB or its successor.



6.6.5 Involve the JAAB in collecting decisions

JAS has to spend a material amount of time defending why it holds the volume of collections it does. This demonstrates a lack of understanding by key internal stakeholders about the nature, purpose and value of the collections (and how they could be of value to them). It also places JAS in an isolated and defensive position, inhibiting its capacity to be a visible, engaged element of the councils. It is therefore recommended that the governance body has oversight of the collecting process including the content and implementation of the Collections Development Policy and major collecting decisions as well as being informed of all collecting activity.

6.6.6 Establish the Dorset Centre for Creative Archives

JAS should leverage its strength in collections from creatives based in Dorset as it contains

- Figures who are well known even iconic, thus providing recognizable touch points for promotion and engagement
- Extensive content that has points of familiarity for engaging diverse audiences, depth for enabling high quality research, variety for tapping into a wide range of audiences and visually attractive content with which to engage a wide range of audiences

By creating a 'Centre JAS will

- Bring some of its finest collections to wider audiences
- Create an attractive, easily understood concept around which partnerships, funding and engagement can be developed
- Provide the basis for partnerships, programmes and funding that will attract visitors to the region and support local and in-bound tourism
- Create a defined presence with which the local universities can engage to the benefit of students (many of whom live in Dorset) and to promote Dorset to potential staff and students from outside the county
- Enhance the BCP's and Dorset's cultural offer and strategies as well as the Councils' reputations

Creating the 'Centre' will require careful thought to develop but it does not need to be initially complex. Key areas of consideration will be:

- Developing a vision and purpose
- Creating a simple brand
- Working with well-chosen partners to develop an initial set of goals and workplan

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6.6.7 Fund and build a new storage facility for Dorset Centre for Creative Archives

Building a dedicated facility for an identifiable sub-section of the collections would provide an appealing focus on which to seek funding for dealing with JAS's accommodation problem.

DAT to head up a community crowdfunding campaign

DAT/the councils to approach the non-Executive Directors of Wessex Water about sponsorship of the facility's construction in parallel with JAS accepting the Wessex Water Archive

6.6.9. Do not undertake a rationalization programme

As analysis in 6.4.3 demonstrates, rationalization would require a significant amount of professional staff time for relatively small amount of freeing up of storage space. This staff time would be better spent on activities such as grant applications, providing services to the councils and residents and raising income through grant applications.

However, there must be sufficient good practice to ensure the JAS does not accrue unrationalized content. All material must receive an initial appraisal ahead of its deposit into the History Centre, particularly material coming from the two councils of which there could potentially be a large amount over a short period in the near future in particular.

JAS is recommended to continue with its collecting approach of seeking out higher value collections to make the best use of the restricted storage space.



7. Summary of recommendations and outline resourcing

This chapter summarises the recommendations at the end of each of the preceding chapters along with broad-brush resourcing needs and where appropriate income generation/cost saving opportunities. The suggested timetables indicate that significant progress could be made in most areas over the next three years.

7.1 The purpose of the recommendations

The recommendations are wide-ranging but aim to fulfil the following goals:

- To safeguard the JAS as the custodian of an on-going, coherent documentary record of Dorset - its people, places and its core institutions
- To improve the relevance and coherence of the service offer to potential users
- Providing location-specific 'content' for local audiences
- To establish within stakeholders' awareness that JAS is a proactive service, not a passive recipient of records
- To establish the JAS as a known and valued internal business service to Dorset and BCP Councils focused on the management and productive use of their corporate memories
- To move digital services to being a central element of JAS's offer as the councils transform digitally and Dorset as the county moves towards comprehensive 5G coverage.
- To further development JAS's role as a core partner for heritage and HE organisations in the South East
- To enhance the coordination and complementarity between JAS and other cultural providers

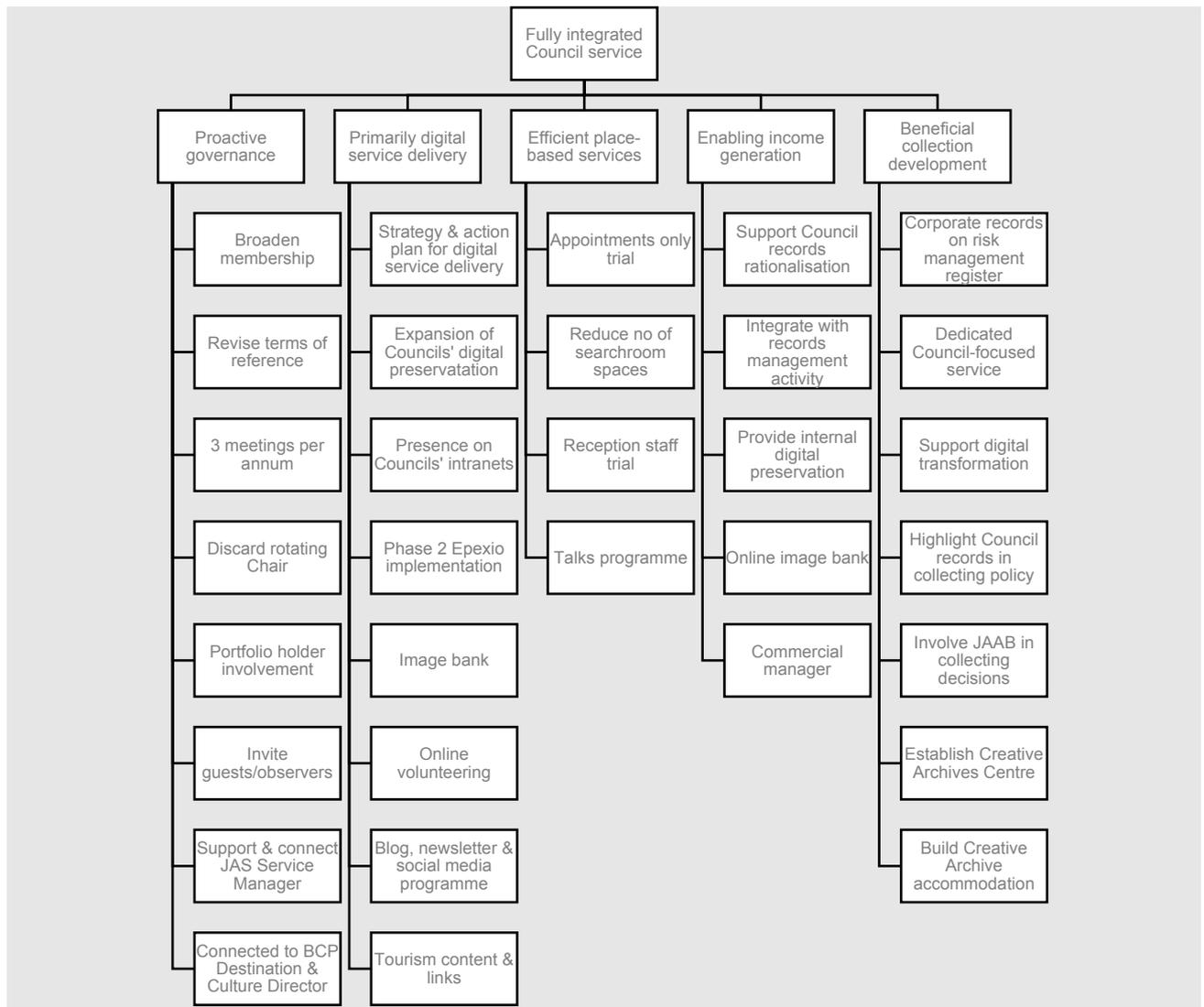
If the current situation continues there is a very substantial risk that the JAS will become increasingly irrelevant and unable to connect and contribute, leaving simply the costly legacy of a large store of collections that cannot be accessed beyond the reading room. Instead the JAS can be a valued public service and a central support in Dorset and BCP Councils managing their information assets efficiently and legally.





7.2 Priority recommendations

This report provides numerous recommendations. The priority recommendations are highlighted in green in each table. They have been chosen with the aim of providing the foundations for integrating JAS better into wider Council activity and reaching wider audiences through proactive governance, digital delivery and enabling Council-wide operational efficiencies. The priorities are summarised in the following diagram:



7.3 Governance

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The governance recommendations would deliver an overhaul of the JAAB so that the JAS could be better connected into and actively managed by its funders, and thus fulfil its potential to support their goals and efficient operations. The recommendations would not have a financial cost and could be implemented in the next year. But they would require the active engagement of all the JAAB members.



Governance recommendations	Costs	12 months	3 years	5-10 years
Broaden out membership of the JAAB to create an Executive Committee	JAAB members' time			
Revise the Terms of Reference for the JAAB	JAAB members' time			
Increase JAAB meetings to 3 times a year	JAAB members' time			
Discard rotating JAAB Chair principle and appoint on a 2 year basis	None			
More active involvement of the Councils' Portfolio Holders	Time of portfolio holders			
Invite JAS team members and other relevant guests to JAAB meetings to illustrate the JAS's current work	Staff time			
Invite the Chair of DAT to be an Observer on the JAAB	Travel expenses for DAT?			
Support for the JAS Service Manager to navigate internal systems and connect with officers in both DC and BCP	Service Directors time			
JAS Service Manager to liaise with the BCP Director for Destination and Culture	None			
Create a service overview for new members induction and internal senior stakeholder engagement	JAS Staff time			

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Ensure key decisionmakers are signed up to receive the archives e-bulletin	JAS Staff time			
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7.4 Audience development

The JAS should seek to develop its audiences in the following areas:

- Expand audiences focused on: individual localities in the Dorset/BCP regions, universities, Dorset Council departments, Health and Social Care, the Arts Development Company, Museums visitors, Library users
- Maintain individual researchers and local residents who are naturally attracted to the service
- Nurture those audiences with which the JAS has low-level or no on-going engagement i.e. tourism, younger adults, ethnically diverse communities and BCP Council departments

The means of much of this engagement is covered in recommendations around digital and place service delivery. Underpinning all audience development will be the following approaches:

- Linking directly into and contributing to development and delivery of relevant strategies such as the Council Plans, the Councils' digital transformation plans, cultural strategies including BCP's Cultural Compact, the Dorset Tourism Association arts and culture strategic bid, Exeter University's emerging creative strategy and Bournemouth University's BU25 Plan
- Demonstrating relevance to key stakeholders, particularly potential internal users
- Maintaining and growing relationships both internal and external
- Promoting the profile of JAS

The JAAB members will be crucial in implementing these four areas both in improving awareness of the JAS amongst their own colleagues, but also using their influence and contacts to give the JAS much-needed introductions into key conversations and decision-making processes.

7.5 Digital and place-based services

With the fall in on-site user numbers, the large expansion of online engagement and the lack of staff to travel offsite, it is recommended that the JAS move to a 'digital first' service with judicious choice of a small range of physical service offerings. Much of the digital delivery can be supported through the recently purchased 'Epexio' system and implemented over the next 3 years. However, digital delivery will require additional staff capacity through using volunteers, possibly streamlining searchroom opening times, project funding and appointment of a commercial manager (see income generation recommendations). The prioritised recommendations are based on enabling good return on investment with delivery to local audiences, developing large scale audiences and managing the corporate record. They create a core from which other services can be built up.



	Resourcing	Financial return	12 months	3 years	5-10 years
Accessing collection content					
Image bank of locations and events and charged for downloads/prints	Existing Epexio system supplemented by Metadatis improvement to gallery view of catalogue or third party integration AP	Image sales			
Large scale digitisation of collections based on themes and locations, starting with 'creative' archives	Existing Epexio system Staffing to digitise & document Possible volunteer involvement	Access via a paywall			
Digitisation and online access to specific document types e.g. deeds and maps	Existing Epexio system Staffing to digitise	Access via a paywall			
Online exhibitions	Long form content display required either on Epexio or other; Epexio Narrate in development Staff & volunteer time to create content				
Links to catalogues & collection information	Staff time to add links				
Accessing JAS services					
Curated blog content	Staff time to develop				



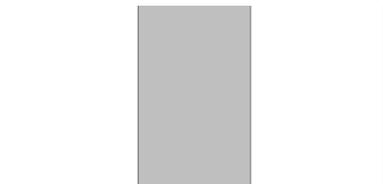
JAS newsletter	Staff time to develop				
Social media	Staff time to develop Staff training				
Online guides to using collections ranging from basic to advanced	Staff time to create and launch content	Some content charged for			
Videos and online workshops for research skills	Create You Tube channel for free Staff time Professional film producer?	Some content charged for			

	Resourcing	Financial return	12 months	3 years	5-10 years
Events diary with online booking and payment	Use commercial third party service such as Eventbrite, or Pretix with Stripe connected to gov.uk pay account	Charged-for events			
Online events	Staff time to develop Suitable delivery technology e.g. MS Teams Staff training	Charged-for events			
Enabling users to dynamically interact with the collections					
Online volunteering	Facility requires development e.g. connection to third-party system such as https://volunteermakers.org/				
User account to bookmark content, create albums of content,	Available through Epexio once the Phase 2 implementation is finished				

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Users add their own memories	The technology requires development of Epexio, or integrate with Disqis (a networked community platform for website) Staff time		
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	Resourcing	Financial return	12 months	3 years	5-10 years
Walking app/ 'Know Your Place' facility	Would be a significant investment Requires technical development. Baseline technology exists for geocoded archive records / Solr via Epexio Requires developer for Trails App. Geocoded content via CMS such as WordPress. Delivery and testing to App store Staff time to develop content and test	Sell linked content e.g. digitised images			
Skills development					
Education and learning resources	Staff time	Charged-for packages			
Connecting JAS collections to other heritage collections in Dorset					
Links to JAS offer from Visit Dorset website	Staff time to build relationships to enable linking				
Provide imagery and content for tourism teams social media platforms	Staff time to understand requirements and develop narrative				
Feed into the library and museum catalogues	Develop a federated search, display results on library OPAC screen using results from the Epexio API				
Joint exhibitions	Staff time to create content				
Access JAS collections and services via other online providers					



Profile and links on the Councils' intranets	Staff time to create content				
	Resourcing	Financial return	12 months	3 years	5-10 years
Content for digital reminiscence cascaded through care homes	Staff time to create content and instigate roll out via volunteers/care home staff	Charged for packages			
Reciprocal links with other heritage/cultural bodies websites	Staff time to set up links				
Creation of heritage itineraries for Visit Dorset	Staff time to create content				
Linking residents with other council services	Staff time to add links Would need to be as part of the wider programmes joining up of council services & move to digital council services	Business efficiencies			
Offers of bespoke help and tours on Visit Dorset	Staff time to create content	Charged-for packages			
Collecting digital collections					
Digital preservation expansion across the Councils' own records	Digital preservation system is in place but will require expansion from 1.2 FTE staffing to 2 FTE staffing and expansion of storage capacity	Paid-for service to external organisations & individuals			

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Advice on managing records through help pages, You Tube videos and named email contacts

Staff time to create content and respond to questions





Enabling actions for digital service delivery					
	Resourcing	Financial return	12 months	3 years	5-10 years
Develop a strategy for digital service delivery, action plan & responsibilities	Staff time				
Continue to Phase 2 Epexio installation	Already costed but staff time				
Research the potential for developing a 'walking app'	Staff time				
Train JAS staff and task them in digital skills e.g. social media	Staff time				
Extend digital storage capacity including for Preservica	Dependent on storage amount required Fund out of Council digital transformation budgets				
Increase digital preservation staffing capacity	Take current digital archivist back up to an FTE				
Give the JAS access to each Council's asset register to identify and support the care of information assets.	Staff time				



Place-based recommendations for JAS					
	Resourcing	Financial return	12 months	3 years	5-10 years
Trial appointments-only use of searchroom	No additional requirements	May free up staff for digital delivery work			
Reduce number of spaces in searchroom	No additional requirements	May free up staff for digital delivery work			
Trial reception staff managing searchroom bookings	No additional requirements	May free up staff for digital delivery work			
Annual external talks programme	Staff time				
Host group visits	Staff time	Some can be charged-for			
An annual touring exhibition	Staff time				
Develop content for literary, artistic and historic walks and trails	Staff time	Guided walks can be charged for			
Loan archival items to relevant visitor attractions	Staff time				
Visits to council offices to advise on manging records	Staff time				

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Improving interpretation at Tyneham Village	Staff time	Potential for a collaborative funding bid with tourism and countryside teams			
	Resourcing	Financial return	12 months	3 years	5-10 years
Create memory bags for loan through the library service	Staff time				
Develop heritage packages for use in libraries featuring well-known local people, landmarks and historic events	Staff time				
Negotiate commitment for housing developments to feature street names of heritage relevance	Staff time				
Develop mental health programme linked to Herrison Hospital	Staff time	Co-production and commissioned potential			



7.5 Income generation

For the JAS to continue to generate and expand the income it generates it will need to maintain certain activities, grow others and initiate new ones. A mix of activity is required - there is no 'magic bullet' of income generation. The JAS has leveraged most of the income generation options available to it so any further income generation will be through additional services and involving the JAS in good records management within both Councils to create savings in operational costs. To maximise both the income generation and the business efficiencies of good records management will require the appointment of a commercial manager (self-funding) and professional records management staff (paid for by the business efficiencies they would generate) under the management of the JAS.

The recommendations which have been prioritised as those which drive cost savings and adds value for the Councils as these are the most effective ways of 'raising' a substantial amount of money via the JAS.

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Maintain existing services					
	Costs	Financial return	12 months	3 years	5-10 years
Rental of accommodation and room hire with a review of rates to ensure they are in line with market rates but do not deter tenants and clearly promote on website	Nil	As per accounts			
Car parking	Nil	As per accounts			
Grant applications and donations on a project basis	Staff time	Variable			
Research service	Staff time	As per accounts			
Onsite photography by visitors	Nil	As per accounts			
Reproduction fees with a review of charges	Nil	As per accounts			
Selling individual copies of documents notably digital copies	Staff time	As per accounts			
Conservation services	Staff time	Breaks even			

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Selling archival boxes	Staff time and raw material	Breaks even			
Renegotiate terms with Ancestry or find another provider in 2024	Staff time	Improve the percentage royalty from current rate			



Expand existing services					
	Costs	Financial return	12 months	3 years	5-10 years
Support rationalisation of Council records and enable closer relationships between JAS and the councils' records management functions		Minimises threat of fines from ICO and other non-compliance, delivers business efficiencies, supports building asset rationalisation, minimise digital storage costs and thus the carbon footprint			
Digital preservation on behalf of Dorset and BCP Councils		Saves each department a software licence charge c. £10k per year and related staff cost, supports homework which in turn supports asset rationalisation			
Charged outreach both physical and online e.g. workshops, talks, training, tourism packages	Staff time, venue hire				



Develop new activities					
	Costs	Financial return	12 months	3 years	5-10 years
Online image bank	Use existing images (Remote) volunteer team to document Staff time to manage	Sales of images			
Hosting wedding ceremonies in the lecture room	Refurbishment of lecture room and staff time to manage bookings and events				
Film screenings	Staff time	Perhaps £500 ticket income per event plus commission from the mobile bar provider			
Digital preservation consultancy and service provision to private organisations	Staff time and marketing costs plus additional digital storage costs where required	Unknown but could develop a formula to always generate a profit e.g. staff +licences +storage costs plus 10%.			

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	Costs	Financial return	12 months	3 years	5-10 years
Research large scale digitisation of collections based on themes and locations, starting with 'creative' archives	Existing Epexio system Staffing to digitise & document Possible volunteer involvement	Access behind a paywall			
Digitisation and online access to specific document types e.g. deeds and maps	Existing Epexio system Staffing to digitise	Access via a paywall			
Enabling actions					
Appoint a commercial and customer support manager	c. £30k per annum	Should break even as a minimum			
Create online support mechanisms e.g. paywalls, content display, online ordering	Mostly covered by the capabilities of the existing Epexio system				



7.6 Collections development and management

The JAS has a rich collection and opportunities for further development. However, it is lacking in key records from Dorset and BCP Councils. The JAS is one of the most advanced local authority services in the UK for its digital preservation services, many councils do not yet have this capacity. This needs to be maintained and expanded to ensure the longevity and accessibility of the Councils' records and maintain its wider record of Dorset in the digital age. Inevitably the JAS still needs additional storage space as its collections grow but this may be possible by creating a 'Centre for Creative Archives' which would pull in new partners and audiences, play on the strengths of the JAS collections and create an enticing concept for a new bid to the National Lottery Heritage Fund. The prioritised recommendations provide the core for all other areas of development identified in this review.

	Cost	12 months	3 years	5-10 years
Place records management long-term survival of corporate records via support of the JAS on the Councils' risk management registers	Nil			
Create a separate internal service to support Council staff and their management of analogue and digital records	Depends on delivery model - could range from a dedicated online advice centre to a records manager with an assistant and a storage facility			
Support BCP in its digital transformation notably in providing digital preservation services	Dependent on the role the JAS takes one - may require an additional staff member			
	Cost	12 months	3 years	5-10 years



Strengthen the Acquisition Policy to emphasise Council records	None			
Involve the JAAB in collecting decisions	None other than the time of the JAAB members			
Establish the Dorset Centre for Creative Archives	Initially none other than creating a simple brand. Future costs will depend on the scale and nature of the activity e.g. an annual academic conference with the local universities, online curated content, feeding into tourism offers.			
Fund & build a new storage facility for the Dorset Centre for Creative Archives	c. £3mn plus any additional storage that has to be rented in the meanwhile as the current storage becomes full			
Do not undertake a collection rationalisation programme	N/A			



8. Conclusions

The JAS is a high quality archive service for the following reasons

- Maintains the authoritative written record of the history of the Dorset region
- Low cost - expenditure per head of population at £1.16 compared with an average of £1.71 for archive services in non-metropolitan councils (see Appendix 6).
- Effective fundraiser and alert to income-raising opportunities
- An early adopter of technologies (e.g. a leader in digital preservation) and collaborative opportunities
- Well-set up for moving to a digital-first service with its Preservica and Epexio systems
- Provides an agile and welcoming service to all its audiences
- Highly respected by a wide range of stakeholders including internal council users, local universities, The National Archives, other heritage bodies
- An effective and enthusiastic partner with a continuous look-out for funding and project opportunities

As the Archive Accreditation Report 2018 noted:

‘The Panel commended this strong service on its all-round delivery, and on the strength of its management and collections approaches. They were impressed with the developing level of provision for digital records transfer and glad to see such progress on an issue which is recognised as a national challenge....Dorset History Centre is willing to participate in new programmes and take forward new initiatives and this helps take forward the development of archive service across areas of service delivery.’

The JAS has much more to offer its funding councils as an effective asset to:

- Supporting council priorities around dynamic and unique places, connected and healthy communities and fulfilled lives
- Vastly improve business efficiencies and statutory compliance through advising on high quality records management
- Securing the long-term corporate memory of the councils through coherent archiving of their records
- Supporting the move to digital services via managing the digital record
- A conduit for other services
- A flexible partner to support, *inter alia*, tourism, higher education and health and well-being

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- Promoting the region through the quality of its collections and a judicious range of partner engagement

But this asset value can only be realised if the JAS is fully integrated into the Dorset and BCP Councils. Revision of the JAAB with an actively engaged membership is key to unlocking this integration.



Appendix 1 Income analysis for JAS

	2015 - 16 £	2016 - 17 £	2017 - 18 £	2018 -19 £	2019 - 20 £	5 year total £
Bournemouth and Poole contribution	240,800	240,800	240,800	245,000	284,400	1,251,800
Dorset County Council/Dorset Council	300,600	300,600	300,600	305,800	266,400	1,474,000
<i>Total Council Contribution</i>	<i>541,400</i>	<i>541,400</i>	<i>541,400</i>	<i>550,800</i>	<i>550,800</i>	<i>2,725,800</i>
Total 'Other' income i.e. from non-council sources	139,063	278,679	250,203	278,805	137,795	1,084,544
<i>Total income</i>	<i>680,463</i>	<i>820,079</i>	<i>791,603</i>	<i>829,605</i>	<i>688,595</i>	<i>3,810,344</i>
Other income as % of BCP funding	58%	116%	104%	114%	48%	87%
Other income as % of DC funding	46%	93%	83%	91%	52%	74%
Other income as % of all council funding	26%	51%	46%	51%	25%	40%
Other income as a % of total funding	20%	34%	32%	34%	20%	28%



Research income	2015 - 16	2016 - 17	2017 - 18	2018 -19	2019 - 20	Total for the 5 years
Archivists Research/professional advice	312	896	12,538	492	6,500	20,737
General Research	1,500	2,390	2,884	1,577	1,301	9,652
Total Research income	1,812	3,286	15,422	2,068	7,801	30,389

Grants income	2015 - 16	2016 - 17	2017 - 18	2018 -19	2019 - 20	Total for the 5 years
New Burdens		5,789	2,293	30,784	8,202	47,069
Grants		8,097	9,466		558	18,121
Bankes Project Grant	31,350	118,881	133,808	109,729		393,768
Poole project	26,189	18,809				44,998
Reminiscence project		33,215				33,215
Wellcome project				50,985		50,985
Frink Project					25,200	25,200
Total Grants income	57,539	184,791	145,567	191,498	33,960	613,355



Other income	2015 - 16	2016 - 17	2017 - 18	2018 -19	2019 - 20	Total for the 5 years
Renting strongroom or office inc. Museums	38,962	47,062	49,362	49,362	49,362	234,110
Donations (inc. a bequest by instalments 2016 - 2018)	11,417	10,036	3,660	3,353	588	29,054
Total Other income	50,379	57,098	53,022	52,715	49,950	263,164

DHC energy consumption	2014 - 15	2015 - 16	2016 - 17	2017 - 18	2018 -19	2019 - 20	2020 as a % of 2014 costs
Electricity kWh	230,282	195,117	210,379	195,434	70,643	58,623	25
Gas	197,289	170,752	245,945	233,702.95	107,461.20	131,296	67

Goods and Services	2015 - 16	2016 - 17	2017 - 18	2018 -19	2019 - 20	5 year total (£)	% of total
Camera Permits	1,834	1,960	2,084	2,484	2,205	10,567	5.9
Copy certificates & certified copies	307	443	433	336	129	1,647	0.9
Photocopies (418	463	623	821	339	2,664	1.5
Digital copies	3,456	3,930	3,415	3,225	4,220	18,245	10.3

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Microfilm printouts	534	634	525	628	433	2,754	1.6
Public Network computer copies (self service)	510	258	246	113	148	1,274	0.7
Photocopies (self service)	350	463	192	244	255	1,504	0.8
Publications	1,215	426	473	338	256	2,707	1.5
Vending machine	656	571	383	747	602	2,959	1.7
Postage & Packing	29	36	8			73	0.0
Rights and permissions (498	243	859	417	2,017	1.1
Conservation	630	4,581	13,948	4,546	5,997	29,702	16.7
Education & Outreach	1,218	905	665	1,328	753	4,868	2.7
Car Parking	6,164	5,220	2,939	4,411	4,159	22,895	12.9
Lecture Room Hire	5,099	4,747	4,439	5,857	3,587	23,729	13.4
Community Engagement Projects	1,319	4,260	3,533	4,794	4,238	18,143	10.2
Magistrates	4,137	4,110	2,043	1,793		12,083	6.8
Dorchester Cemetery Project	1,458					1,458	0.8
Ancestry					18,346	18,346	10.3

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Total - Goods and Services	29,333	33,504	36,191	32,524	46,083	177,637	100
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Appendix 2 Comparison of income generation taken from CIPFA Statistics

	Dorset			Devon	
	Sales of goods and service plus research income plus other income as a % of total revenue income	Sales of goods and service plus research income plus other income as a % of total revenue expenditure		Sales of goods and service plus research income plus other income as a % of total revenue income	Sales of goods and service plus research income plus other income as a % of total revenue expenditure
2014-15	24	11		38	8
2015-16	22	9		19	8
2016-17	47	23		-	-
2017-18	96	20		36	7
2018-19	30	9		32	7

	Essex			Northumberland	
	Sales of goods and service plus research income plus other income as a % of total revenue income	Sales of goods and service plus research income plus other income as a % of total revenue expenditure		Sales of goods and service plus research income plus other income as a % of total revenue income	Sales of goods and service plus research income plus other income as a % of total revenue expenditure
2014-15	-	-		32	8
2015-16	31	9		39	12



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2016-17	-	-		63	18
2017-18	77	39		83	10
2018-19	75	33		80	11

Appendix 3 Assessment of income generating activities that are not recommended

Activity	Explanation
Onsite catering	Insufficient footfall and accommodation
Civil registration certificate copies with online ordering and pay	JAS has already explored this before when the incumbent Registrar was not interested. It may be worth revisiting in the future.
Archival services for privately held collections including surveying, appraisal, cataloguing, answering queries	Occasionally undertaken by JAS for free when a collection is offered to persuade the depositor to invest in some basic preparation ahead of transfer to JAS. Very small market There is freelance consultant already offering this service in Dorset.
One-to-one research support	Tried by JAS in the past without success. The likely market is small. Would require marketing to develop
Baptism certificates	Only required for evidence for marriage so a very small market that is not worth promoting. Might be part of a wider packaged research offer.
Large scale digitisation and copying	Lack of space, kit and staff to do more than small scale copying. Would be in competition with commercial providers so would need significant research and promotion.



<p>Consultancy - archival skills training, digitisation skills training,, oral history training,</p>	<p>Probably quite a small market but could be offered to community heritage and arts groups but this would not earn significant income. JAS already tackles this by working with groups to be included in their funding bids for this work and then the funding bid pays for JAS's consultancy</p>
<p>Providing consultancy to public bodies to enable them to meet their requirements to deposit public records</p>	<p>Public bodies have never responded to JAS's approaches on this matter. It is unlikely to be a profitable venture.</p>



Appendix 4 Sample job description for a commercial manager

Job role

To lead the development and implementation of a comprehensive commercial strategy, introduce new income streams and maximise self-generated income and profit

Job Description

The post-holder is responsible for:

1. Strategy and Business planning:

- Developing, implementing and managing the commercial strategy.
- Championing commercial development throughout the service and Councils, to ensure that commercial issues are integrated into the planning cycle.
- Drawing up and implementing annual business plans (including profit and loss accounts) in conjunction with the Service Manager
- Supporting the planning process through the development and delivery of a commercial development plan.
- Leading on the planning and development of all commercial events, and offers/products
- Providing market comparisons, trend data and strategic recommendations of areas of development

2. Management:

- Lead or act as a member of project teams for the development of new initiatives.
- Prepare timely, accurate, high quality reports, presentation and briefings
- Act as the main interface with commercial partners and .
- Present and promote commercial activity to internal stakeholders

3. Maximise sales income in existing areas on-site, off-site and online

4. Develop new income streams:

- Identify and pursue new avenues of sustainable revenue generation.



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- Identify and project manage grant applications
- Collate information on the service's assets in relation to trading and specific markets, e.g. collections for licensing, venue hire, and review business activities to establish their current profitability and their potential for further development.
- Develop the organisation's on-line trading capability, investigate options and develop and manage a plan for growth.
- Work with colleagues to develop and exploit Intellectual Property Rights (IPR) and licensing opportunities.

5. Contracts:

- Monitor all commercial contracts to achieve best profit margins
- Develop strong links with a wide range of suppliers, and where appropriate, network with relevant staff in other venues and institutions

Experience

A proven track record of successful commercial income generation in a heritage setting, preferably with an element of working with archival assets.



Appendix 5 Case study of Explore York Image

<http://images.exploreYork.org.uk/>

This online image bank was launched in February 2020 to replace a very outdated predecessor. Like that predecessor, it was established with the dual purpose of connecting people with York's heritage through the archive service's photographic collections and to generate income. The previous process for buying copies of images, though, required modernisation, and staff were particularly keen that the replacement provided even greater access to the archive collections.

The site currently provides access to 7,600 images. These can be searched through a high quality search engine, controlled search terms and through three categories – People, Places, Events. (It is important to have good quality metadata about each image to enable easy searching.) Explore York chose the specific system because it intends to significantly grow the number of images held over the coming years to aid accessibility, having already doubled it in the first 10 months. It currently has an archive trainee digitising images to generate more content. Whilst a separate website, York Images and the service's main website clearly link to and explain each other.

A primary aim is to generate income. There was an initial set-up cost which was met by a social investment grant. Explore applied for the grant direct, with the aim of providing feasibility studies in key areas of income generation for the business. As the grant was successful, it turned out the entire cost of the Explore York Images project could be funded through it. There is also an annual maintenance fee with the supplier CiT Digital. Additional costs include the significant time spent by Explore York staff preparing the images and metadata for transfer and in creating of the controlled vocabulary.

Due to the pandemic, extensive marketing has not been undertaken by Explore so far, but staff know that the market can be developed to increase purchases for licensing and commercial use as well as personal purchases. Explore York offers a free account to select local partners (e.g. the York Press features editor) so the partners can use the images and promote the collections on Explore's behalf to a wider audience, and advertise the platform at the same time.

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Explore is confident that the website is useful at engaging people in the city's history. In 2020 despite the lock down and no marketing other than at launch it attracted 61,013 visits in the first ten months. It is very happy with this new resource, the work of CiT Digital in the creation of the database in their ongoing support, and sees it as a primary element in its public offer and income generation, which it will promote and develop in the coming years.

The archivist and her manager at York Explore would be very happy to discuss the project with JAS and its partners.



Appendix 6 Comparison of revenue expenditure per head of population for non-metropolitan local authority archive services (source CIPFA statistics for archive services 2018-19)

Non-metropolitan district	Population	Total revenue expenditure (£)	Total revenue expenditure per head of population (£)
Leicestershire	1,093,200	558,161	0.51
Lancashire	1,498,300	767,944	0.51
Derbyshire	796,100	411,569	0.52
Cambridgeshire	651,500	364,823	0.56
Cheshire	1,059,200	664,746	0.63
North Yorkshire	614,500	446,118	0.73
Hertfordshire	1,184,400	870,928	0.74
Essex	1,832,800	1,351,499	0.74
West Sussex	858,900	657,552	0.77
Somerset	773,300	642,837	0.83
Durham	633,600	537,174	0.85
Berkshire	911,400	789,389	0.87
Devon	931,100	833,712	0.90
Nottinghamshire	1,154,200	1,036,857	0.90
Buckinghamshire	540,100	545,884	1.01
Bedfordshire	669,300	716,234	1.07
Hampshire	1,376,300	1,473,408	1.07
Portsmouth	215,100	242,316	1.13
Suffolk	758,600	856,456	1.13
Dorset	772,300	892,757	1.16
Staffordshire	1,131,000	1,400,456	1.24



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Isle of Wight	141,500	175,602	1.24
Norfolk	903,700	1,206,185	1.33
Bath & North East Somerset	192,100	257,364	1.34
Surrey	1,189,900	1,643,663	1.38
Plymouth	263,100	390,275	1.48
Oxfordshire	687,500	1,043,784	1.52
Shropshire	498,100	812,393	1.63
East Riding of Yorkshire	339,600	562,197	1.66

Non-metropolitan district	Population	Total revenue expenditure (£)	Total revenue expenditure per head of population (£)
Bristol	463,400	844,508	1.82
Northumberland	320,300	598,574	1.87
East Sussex	845,000	1,826,818	2.16
Gloucestershire	916,200	2,405,268	2.63
Cumbria	498,900	1,342,493	2.69
Worcestershire	592,100	2,051,107	3.46
Herefordshire	192,100	777,985	4.05
York – may include the library costs as well hence the higher figures	209,900	3,173,750	15.12

		Average cost for those services that provided data	1.71
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Appendix 7 Example of using the skills of the archive service to support staff working from home

Below is an article from the Local Government Association website at <https://www.local.gov.uk/archive-staff-enable-home-working-gloucestershire-county-council-and-gloucester-city-council>

Archive staff enable home working: Gloucestershire County Council and Gloucester City Council

Archive staff in Gloucestershire worked quickly, using their specialist

professional archive skills to set up a system which enabled the scanning and sending of physical post to staff working from home.

“Thanks again for all you’re doing – we’d grind to a halt without your efforts.” Staff member, Gloucestershire County Council

Archive staff in Gloucestershire worked quickly, using their specialist professional archive skills to set up a system which enabled the scanning and sending of physical post to staff working from home. At the very beginning of lockdown, archives staff were asked by the silver command group within the County Council to set up a ‘scan and send’ postal service. The service which is now embedded in business as usual enables Gloucestershire County Council and Gloucester City Council colleagues to continue to work from home.

The challenge

The key challenges facing the service were:

- How to deliver physical post from more than 90 different pigeon-holes to the correct contacts working at home
- How to do this promptly at financial year end with lots of invoices requiring payment.
- How to avoid security breaches with badly addressed envelopes and potential human errors

When first walking into the post room, the task looked enormous, but by the end of the first day the archive team had broken the back of it and could see precisely how to deliver a cost-effective service with minimal risks.



The solution

The team used their skills as archivists to set up the new service after one day of planning, using resources to hand. This included multi-functional devices (MFDs), flat pack boxes, and requisitioning office and storage space in Shire Hall – not the normal place of work.

Colleagues with a flexible ‘can-do’ attitude and customer focused approach, organisational skills, scanning experience and knowledge of data protection and security breaches proved invaluable.

With help from a well-connected colleague, communications to senior leaders, and permission to open mail, the team established an appropriate network of recipients for scanned mail from all pigeon-holes.*

The team prioritised stopping physical mail at source where feasible, to make the quantities more manageable, then started scanning.

Two separate teams were trained and instructions were developed to ensure resilience and succession planning from the outset. The archives customer services staff would be required to run the archives public service again once permission to re-open the service was given.

Impact

- Over 2000 colleagues were able to work at home and continue delivering the councils’ wide range of services.
- Special arrangements were made for the teams that required physical post, such as those in the legal department.
- The team themselves were proud of the service they developed and received a lot of positive feedback.

“Thank you and your teams for all your hard work so far. It has really meant that our team has been able to adapt to a new way of working without our service being seriously affected.” Staff member, Gloucestershire County Council



“I would just like to say that from my point of view you have completed your task amazingly. Considering the short turn around you had at the start of Pandemic, you and the rest of the Archive Team have really made our lives easier. Our success during these troubling times has been due in no small measure to all your support and for that I thank you! Much appreciated.” Staff member, Gloucestershire County Council

How is it being sustained?

The ‘scan and send’ service has now been adopted as ‘business as usual’ by both councils. Archive staff transferred the operation to Information Management colleagues in July 2020. A 2-week training and handover period was arranged to ensure continuity and pass on tips and knowledge learnt.

The team aims to enhance and streamline the process with further consultation as it moves out of ‘emergency mode’. Archives staff will provide emergency backup to the new team should this prove necessary.

Lessons learnt

- Archives skills are highly transferable and proved a good fit for this project.
- The post-room colleague who sorts the incoming post into the pigeon-holes prior to scanning is a key player in this operation: their knowledge prevents security breaches within the council.
- Responding to an emergency is good for team-building, and all staff really stepped up to the mark. It was particularly pleasing to offer a joined-up service to both county and city councils.
- The task provided an excellent opportunity to learn about the breadth of services offered by county and city councils, strengthen connections across both councils, and raise the profile of the archives service.
- It was a low-tech solution which proved highly efficient and cost effective.



Appendix 8 Physical visitors and enquiries for ‘non-metropolitan’ archive services 2018-19 from the CIPFA Archive Statistics Actuals

Where a service has not provided data this is marked with a ‘0’ so indicating lack of information, not zero users

Non-metropolitan district	Total Visitors of All Kinds to HQ & Branch Sites	Total Attendance at Exhibitions & Displays	Total Attendance at Learning Events	By Post & Email	By Telephone	Total visitors & enquiries	Non-metropolitan district ranked	Total visitors and enquiries
Bath & North East Somerset	3,785	4	357	1,114	1,853	7,113	Bristol	93,248
Bedfordshire	1,322	0	670	909	54	2,955	Surrey	86,779
Berkshire	2,504	262	470	3,429	2,173	8,838	Leicestershire	64,859
Bristol	4,997	82,507	830	3,582	1,332	93,248	Somerset	60,014
Buckinghamshire	11,389	2,950	414	1,087	0	15,840	Devon	50,438
Cambridgeshire	1,751	0	120	1,106	217	3,194	East Sussex	41,080
Cheshire	5,076	1,200	500	3,357	156	10,289	Norfolk	37,489



Cornwall	0	0	0	0	0	0	Shropshire	31,565
Cumbria	6,639	1,773	1,085	3,259	3,344	16,100	Durham	24,978
Derbyshire	4,766	5,000	1,110	1,687	43	12,606	Kent	23,253
Devon	8,273	23,984	748	8,383	9,050	50,438	East Riding of Yorkshire	22,400
Non-metropolitan district	Total Visitors of All Kinds to HQ & Branch Sites	Total Attendance at Exhibitions & Displays	Total Attendance at Learning Events	By Post & Email	By Telephone	Total visitors & enquiries	Non-metropolitan district ranked	Total visitors and enquiries
Dorset	3,586	800	1,110	2,083	1,048	8,627	Suffolk	21,914
Durham	3,495	0	7,084	14,399	0	24,978	West Sussex	20,077
East Riding of Yorkshire	9,427	9,427	495	1,345	1,706	22,400	Lancashire	19,747
East Sussex	12,342	21,479	4,583	2,676	0	41,080	Northumberland	19,155
Essex	8,854	0	4,273	0	0	13,127	Gloucestershire	17,171
Gloucestershire	4,588	1,891	8,608	2,084	0	17,171	Nottinghamshire	16,576
Hampshire	0	0	1,295	3,710	2,160	7,165	Hertfordshire	16,457



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Herefordshire	9,300	630	912	978	1,285	13,105	Cumbria	16,100
Hertfordshire	6,737	0	3,711	4,457	1,552	16,457	Buckinghamshire	15,840
Isle of Wight	1,724	147	817	222	0	2,910	Staffordshire	15,582
Kent	8,205	1,857	446	7,295	5,450	23,253	Worcestershire	14,889
Kingston-Upon-Hull	0	0	0	0	0	0	York	14,678
Lancashire	6,419	400	4,904	4,205	3,819	19,747	Lincolnshire	14,615
Leicestershire	10,745	44,327	1,910	4,663	3,214	64,859	Essex	13,127
Lincolnshire	4,708	0	0	4,706	5,201	14,615	Herefordshire	13,105
Medway	0	0	0	0	0	0	North Yorkshire	12,687
Non-metropolitan district	Total Visitors of All Kinds to HQ & Branch Sites	Total Attendance at Exhibitions & Displays	Total Attendance at Learning Events	By Post & Email	By Telephone	Total visitors & enquiries	Non-metropolitan district ranked	Total visitors and enquiries
Norfolk	10,454	720	10,075	9,651	6,589	37,489	Derbyshire	12,606



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North East Lincolnshire	622	994	373	493	243	2,725	Cheshire	10,289
North Yorkshire	4,320	0	2,356	3,024	2,987	12,687	Berkshire	8,838
Northamptonshire	0	0	0	0	0	0	Dorset	8,627
Northumberland	6,080	5,440	3,688	1,700	2,247	19,155	Oxfordshire	7,709
Nottinghamshire	6,153	6,153	2,022	2,248	0	16,576	Hampshire	7,165
Oxfordshire	3,475	-	244	2,939	1,051	7,709	Portsmouth	7,160
Peterborough	0	0	0	0	0	0	Bath & North East Somerset	7,113
Plymouth	1,263	-	140	1,043	1,014	3,460	Plymouth	3,460
Portsmouth	4,162	0	390	883	1,725	7,160	Cambridgeshire	3,194
Shropshire	5,875	21,105	1,300	2,663	622	31,565	Bedfordshire	2,955
Somerset	9,648	29,525	6,695	4,834	9,312	60,014	Isle of Wight	2,910
Southampton	0	0	0	0	0	0	North East Lincolnshire	2,725
Staffordshire	7,412	0	1,613	3,665	2,892	15,582	Cornwall	0

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Non-metropolitan district	Total Visitors of All Kinds to HQ & Branch Sites	Total Attendance at Exhibitions & Displays	Total Attendance at Learning Events	By Post & Email	By Telephone	Total visitors & enquiries	Non-metropolitan district ranked	Total visitors and enquiries
Suffolk	12,899	0	4,322	4,693	-	21,914	Kingston-Upon-Hull	0
Surrey	17,588	54,739	3,026	5,028	6,398	86,779	Medway	0
Warwickshire	0	0	0	0	0	0	Northamptonshire	0
West Sussex	6,684	4,103	2,306	4,760	2,224	20,077	Peterborough	0
Wiltshire	0	0	0	0	0	0	Southampton	0
Worcestershire	1,953	0	11,500	1,436	0	14,889	Warwickshire	0
York	6,178	2,675	5,105	701	19	14,678	Wiltshire	0
							Average no of physical users for the 41 services who gave data	21,526





Appendix 9 Which audiences can be initially engaged with individual digital channels

	Localities	University academics & students	Councillors	Council officers	Users of other council services	Health & social care	Arts Dev. Company	Museum users	Library users	Other researchers	Tourism	Young adults	Diverse communities
Accessing collection content													
Image bank of photos and maps of locations, landmarks and local events searchable by location with downloadable and print options	x						x	x	x	x	x	x	x
Large scale digitisation of collections based on themes and locations, starting with 'creative' archives		x				x	x	x	x	x		x	
Digitisation and online access to document types e.g. deeds and maps		x			x					x			

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Online exhibitions to create accessible 'tasters' of the collections	x		x		x	x		x	x		x	x	x
Links to catalogues and collection information		x						x	x	x		x	x

	Localities	University academics & students	Councillors	Council officers	Users of other council services	Health & social care	Arts Dev. Company	Museum users	Library users	Other researchers	Tourism	Young adults	Diverse communities
Accessing JAS services													
Online guides to using collections ranging from basic to advanced	x	x				x		x	x	x		x	x
Videos and online workshops for research skills		x				x		x	x	x		x	
Events diary with online booking and payment	x	x			x	x	x	x	x	x	x	x	x
Curated blog content	x	x				x	x	x	x	x	x	x	x



JAS newsletter	x	x	x	x				x	x	x		x	x
Social media	x	x	x	x	x	x	x	x	x	x	x	x	x
Online events	x	x			x	x	x	x	x	x		x	x
Enabling users to dynamically interact with the collections													
User account to book mark content, create albums of content,	x	x						x	x	x	x	x	x
Users add their own memories	x				x	x	x	x	x		x	x	x
Online volunteering	x					x	x	x	x			x	x
Walking app/ 'Know Your Place' facility	x					x		x	x		x	x	x
Skills development													
Education and learning resources		x						x	x			x	x



	Localities	University academics & students	Councillors	Council officers	Users of other council services	Health & social care	Arts Dev. Company	Museum users	Library users	Other researchers	Tourism	Young adults	Diverse communities
Connecting JAS collections to other heritage collections in Dorset													
Feed into library and museum catalogues								x	x				
Joint exhibitions	x	x			x		x	x	x		x	x	x
Links from Visit Dorset website											x		
Access JAS collections and services via other online providers													
Profile and links on the Councils' intranets			x	x									
Content for digital reminiscence and Mental Health projects						x							
Reciprocal links with other heritage/ cultural bodies websites	x							x	x		x		

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Creation of heritage itineraries for Visit Dorset												x		
Provision of imagery and content for Visit Dorset												x		
Linking residents with other council services					x									
Offers of bespoke help and tours on Visit Dorset												x		

	Localities	University academics & students	Councillors	Council officers	Users of other council services	Health & social care	Arts Dev. Company	Museum users	Library users	Other researchers	Tourism	Young adults	Diverse communities
Collecting digital collections													
Digital preservation			x	x									
Advice on managing records through help pages, You Tube videos and named email contacts				x									

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Dedicated internal service pages for officers highlighting what the JAS can do for internal departments			x	x									
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Appendix 10 How West Sussex Record Office supports the work of West Sussex Council

Records Management

WSRO provides the vital records management service for the Council. Although the RM Service was set up in 1969, not all departments initially used the service. In 2014-2018 WSRO carried out a Records Management Stabilisation Project to locate and bring in large quantities of records across the county. Since 2014 over 300,000 records have been brought in and processed from over 50 locations across West Sussex. The RMS now houses over 600,000 files/records which are stored across three different sites at the Record Office and two other sites in Chichester and Bognor with work underway to centralise most of this at a WSCC building in Bognor. As a result WSCC now has a fully corporate, comprehensive and legally compliant Records Management Service with an efficient and effective means of managing its paper records. All WSCC records can be found when needed and produced within 24 hours and are managed using retention and disposal schedules. These schedules apply to both hard copy and electronic records.

Stats for files returned to departments show and increases as a result of the Records Management Stabilisation Project:

2012-13	3278
2013-14	3296
2014-15	4202
2015-16	4913
2016-17	5607
2017-18	5893
2018-19	5878
2019-20	5154 (includes the start of lockdown)

The RMS continued to operate throughout lockdown so that staff could access their files.

WSRO is also instrumental in drawing up the corporate retention schedule. This provides the basis for ensuring the Council is adhering to statutory and business requirements on



keeping records, capturing a coherent corporate memory, and efficiently managing space and accommodation assets.

The records management service for West Sussex Council is delivered by one FTE records manager and 2FTE records management assistants to manage the records and deal with thousands of enquires received each year.

The Records Management Service plays major role in facilitating the rationalisation of WSCC building and accommodation as part of the budget savings - both in past and currently. Downsizing, moving staff, selling buildings and giving up leases always entails the need for additional records storage. Hot desking means staff do not have space for large amounts of filing. The RMS is not a current filing registry but can take in all of the non-current filing that needs to be kept in accordance with the retention schedules. The Archive Service plays a major role in the development of Community Hubs - Libraries being repurposed as community buildings with the other services sharing the space alongside the library service. The Local Studies archive resources are being transferred to the Record Office to free up space and centralise the holdings.

Other uses of WSRO by West Sussex Council

- Rights of Way regularly use historic maps for footpaths and enquiries
- County Archaeology will also use maps with their HER work
- Adult and Children's Services – the Record Office holds adoption registers as part of the magistrates' court records, children's homes records and health records including mental health cases. Records at WSRO are also used by individuals who were the data subject (e.g. a child in care), accessing them via Social Care.
- Coroners records
- Providing good news stories. The press officer uses the archives. The Lord Lieutenant and High Sheriff also use the service. For the Queen's 90th the Lord Lieutenant used WSRO to create a record of personal archive photos of when the Queen visited the county right from a toddler on the beach to races at Goodwood. They produced a booklet with a short narrative and an exhibition touring the libraries. The Queen sent a charming thank you letter.
- Legal use the County Council's own archives back to 1880s plus predecessor records and there are many enquiries from within the County Council about its own archives.

How individual collections support the county



The Sussex Declaration

(One of only two known ceremonial parchment manuscript copies of the Declaration of Independence) is high profile. It was the first item the Duke and Duchess of Sussex saw on their first visit to Sussex and went to No. 10 for the Trump State Visit. WSRO received a \$100,000 grant from the Andrew W. Mellon Foundation for the 'Transatlantic Ties project' This sheds light on the shared history of Sussex and the USA as revealed through numerous records in WSRO. It includes the creation of an 'American Collection' - online of digital material consisting of WSRO records, 1701-1865, copies of the *Sussex Weekly Advertiser* from 1775-1784 covering the Revolutionary War period (provided by the Library Service) and objects from the Royal Sussex Regimental Museum Collection with specialist learning resources, and an international symposium. Collaborators include the Universities of Sussex and Chichester and the Royal Sussex Regiment (RSR) Association and Royal Sussex Regiment Museum Trust.

Initial discussions have been held with Harvard University, the US National Archives and the Smithsonian about a possible tour of the Sussex Declaration in the US as part of the 250th anniversary events in 2026. WSRO are also working with multiple partners on a wider project: The American Experience in West Sussex – to look at the wider potential for promoting the close links between West Sussex and the US and the cultural heritage of the county. A series of different options are being explored to take this forward to generate tourism and visitors from both sides of the Atlantic and boost the local economy.

<https://www.westsussex.gov.uk/news/west-sussex-county-council-thrilled-to-welcome-the-duke-and-duchess-of-sussex-to-chichester/>

<https://www.westsussex.gov.uk/news/rare-sussex-declaration-displayed-during-us-presidential-state-visit-to-uk/>

The Shoreham Air Crash Archive

After the disaster WSRO, at the request of the local community, collected the memorial material left at the site. This was really important as it is contemporary collecting and what the community wanted and needed. It also dovetailed with other work by the Council in the wake of the crash. WSRO invited the press in to show what it was going to do so the wider community knew and then invited the press back a year later to show it was conserved, catalogued and available to see. The collection was closed until this work was finished but WSRO allowed bereaved families to see and spend time with it whilst it was closed and when it was digitised, gave a CD to each bereaved family. At the end of each

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visit each family was very grateful to know it was done. WSRO also worked with the bereaved families to agree what content would be put online. WSRO was in a unique position to offer that support to the community and is now part of the Network of Spontaneous Memorials, working together to provide advice and support and communing with other institutions across the world who have dealt with similar events e.g. 9/11.

Regimental Associations

WSRO is a member of the West Sussex Civilian Military Partnership Board and is working with two regimental associations to preserve their heritage, thus connecting with the veteran and military community, which feeds into the Council's wider remit around the military as a member of the Sussex Armed Forces Champion Scheme e.g. ensuring veterans applying for jobs are treated fairly and encouraged to apply jobs. As a result the military communities have also sent through material about their work during Covid for the West Sussex COVID-19 Community Archive.

Record Office Extension : West Sussex Heritage/History Centre

It is intended that much of the above will come together in the development of WSRO into the West Sussex History/Heritage Centre.



Appendix 11 – Support provided to the Councils by the JAS

Which council/area	Department/Organisations	Nature of work	Time period
Dorset County Council	Adoption and Fostering	Advice regarding management of digitised adoption files and required metadata. Transfer and ingest of 40,000+ adoption records into Preservica.	2016-2018
Dorset Council	Information Governance	Meetings, collaboration and support for developing communications and systems around information management	2019-ongoing
Dorset Council	Children's Services	Meetings, advice and support during project to rationalise records requiring long retention including developing digitisation specification and review of records already managed by JAS in Preservica	2020-ongoing
Dorset Council	Democratic Services	Ongoing discussion about the digital preservation of committee minutes from ModGov system	2019-ongoing
BCP	Coroner's Office	Advice regarding digital preservation of Coroners records from Civica system and potential digitisation of historic records	Oct 2020-ongoing
Dorset Council	GIS	Advice and support regarding transfer of historic images to the archives	Dec 2020-Jan 2021
BCP	Major Change and PPMO	Advice regarding management of records, retention periods, and schedules	Oct 2020-ongoing
Dorset Council	Legal	Storage and retrieval of deeds. Further discussions about storage, transfer, and cataloguing system	since c.2010
BCP	Legal	Retrieval of deeds from deposited collections from Bournemouth Borough and Borough of Poole collections	Since c. 2010



Former Poole Borough, Dorset (& County) Council & predecessor authorities	Building Control	Building control enquiries – semi-current records, the authority only needs to keep them for 15 years, but enquiries requiring use of these records go back much further. So we provide a service which the public regard as current, not historic as the records are required for conveyancing. The former Poole Borough regularly requested their microfiche copies, which we hold, on a Records Management type service.	Since 2000
BCP & Dorset Council, as above		Valuations and rateable values. This is a service required by solicitors and retail premises. It is a function of the authority that has devolved to DHC, but the records are regarded as a current, not historic, function by the public.	2000 onwards
Dorset County Council	Legal/Rights of Way	Public inquiries re Rights of Way, expert advice on historic records, we've done a number over the years to provide evidence on provenance and chain of evidential value, production of tithe maps, method of plotting the earliest OS maps, etc. Also provide digitised copies for the department	Occasional, when required c. since 2006
Borough councils	Parish Clerks	Expert advice relating to market charters, inc. translation and interpretation. For Dorchester, Bridport and Wareham and possibly other ancient boroughs in the last five or six years.	Since 2013
Dorset Parish Councils	Parish Clerks	Records management advice to Parish Councils, liaison with the central authority and presentation to parish clerks at their annual training day in addition to ad hoc enquiries.	Training day was probably c.6 years ago but otherwise enquiries ongoing



Pan Dorset work	Independent groups and charities, some supported and part funded by the councils and involved in their Social Care offer	Inclusion - we work with groups whose history may be unseen to improve their representation in Dorset's records. DHC provides project development advice and training, ensuring that records are ultimately deposited in an ethical and useable form. We have recently worked with people affected by learning disabilities, hearing impairment and homelessness. This projects support both councils' drives towards life-long learning and social cohesion	Since c. 2013
Mainly BCP area but also some Dorset Council area	DHC project, with support from Russell Cotes Museum and Bournemouth University	DHC instigated a project which has collected 25 oral history interviews from LGBT+ Dorset residents	since 2018
Pan Dorset	Independent group supported by other officers in the council and Dorset Race Equality Council	Kushti Bok (Dorset's organisation for Gypsies, Travellers and Romany) - DHC are currently providing support to create funding bids to improve their resilience.	2020
Pan Dorset	Spun out organisation funded by the councils	Each year, DHC accepts 3 referrals from Ansbury career advice service. We provide tailored and supported volunteering opportunities for young people facing additional challenges getting into work, education or training	Since 2019
Pan Dorset	Supports both councils' encouragement of volunteering	DHC provides a range of volunteering opportunities for around 30 volunteers, who come from all areas of pan Dorset. We are proud to be accredited Investors in Volunteering	For at least 20 years

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Pan Dorset	Independent groups and charities, some supported and part funded by the councils and involved in their Social Care offer	Older people, including those affected by dementia and their carers - an ever-evolving offer - most recently a fortnightly group 'Inspired by Archives' (part of an AONB Big Lottery funded project). DHC is currently working with partners, including Age UK and Pramacare (charity supporting people in their own homes) to enrich their online offers with bespoke heritage related resources	Since c. 2017
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Please do not delete the footnote.

Footnote:

Issues relating to financial, legal, environmental, economic and equalities implications have been considered and any information relevant to the decision is included within the report.