

Joint Archives Board

13 November 2024

Joint Archives Service Development Plan (2021-26) Monitoring Report

For Decision

Cabinet Member and Portfolio:

Cllr R Hope, Customer, Culture and Community Engagement

Cllr Andy Martin, Customer, Communications and Culture, BCP Council

Local Councillor(s): All

Executive Director:

A Dunn, Executive Director, Corporate Development

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Report Status: Public

Brief Summary: This report provides an update to both funding councils via the Joint Archives Board of the current and future work of the Joint Archives Service (JAS). The updated Service Development Plan appended to this report carries detailed information on the service's activities and the report will highlight work undertaken against the JAS's key objectives. Since the last report (January 2024), the service has:

- Commenced work on the 18-month externally-funded project to catalogue the archives of Thomas Hardy
- Secured over £103,000 from Wessex Water to support the cataloguing, conservation and digitisation of the historic archives of the water industry.
- Acquired a £5,000 grant to catalogue the archives of the Yellow Bus company archives
- Secured pledges of £20,000 towards estate cataloguing projects
- Achieved Accredited status from The National Archives for the second time
- Delivered or supported a range of community engagement activities
- Secured a commitment of £540k within the Dorset Council capital programme towards a revised bid to Lottery for additional archive accommodation.

The JAS priorities for 2021-26 are:

- Actively acquire archives relating to Bournemouth, Christchurch, Dorset and Poole and to work through all available means to preserve, conserve and promote access to them to optimum effect
- Design and deliver digital preservation services across both authority areas
- Provide efficient, innovative and quality digital and place-based services which deliver rewarding experiences for all JAS customers and value for money for the two funding authorities
- Engage a wide variety of audiences with digital and physical resources and events, recognising barriers to involvement and working actively to dismantle these
- Encourage and sustain on-site and remote volunteering so adding value through delivering targeted programmes of work
- Develop and maintain partnerships with a range of organisations both public and private and to pursue project opportunities which both enhance funding to the JAS and deliver positive outcomes and mutual benefits to all parties
- Efficiently manage and enhance the DHC building including the provision of sufficient long-term archival storage space, so increasing value for money for customers, collections and staff

Recommendations:

It is recommended that the Board:

1. Endorses the implementation of the 2021-2026 service plan appended to this report as demonstrating the quality, variety and value for money provided by the JAS;
2. Supports the JAS's ongoing work to ensure the safe and effective transfer of appropriate physical and digital records from both BCP and Dorset Councils to ensure the preservation of the corporate memory and to deliver council efficiencies;
3. Notes the commitment by Dorset Council to £540k of capital match funding to support a renewed bid to the National Lottery Heritage Fund in 2025.

Reason for Recommendation:

Effective oversight of the regular service delivery element of the service plan by the Joint Archives Board is required under the terms of the Inter-Authority Agreement on Archives, 2022

1. Introduction

- 1.1 The Joint Archives Service (JAS) is Accredited by [The National Archives](#) and holds the corporate archives of its funding councils and their predecessor bodies as well as thousands of individual physical and digital collections dating from 965AD which collectively make up the written heritage and memory of Bournemouth, Christchurch, Dorset and Poole. In addition, DHC holds Public Records on behalf of HM Government.
- 1.2 The JAS provides services to the public in three principal ways:
 - On-site - public access at Dorset History Centre (DHC);
 - Off-site - learning and community engagement;
 - Online – a large and growing market for web-based resources, particularly given the JAS’s relationship with Ancestry.co.uk, its online catalogue and digital engagement work.

2. Context and challenges

- 2.1 An externally-led full-service review was undertaken in 2020 and the subsequent [consultancy report](#) published in March 2021. The report was approved by the Joint Archives Advisory Board (JAAB) at its April 2021 meeting and a new five year (2021-26) service plan was written. This draws upon some of the key findings of the consultants’ report, particularly in relation to the efficient acquisition of corporate records and the growth of digital services. The service plan has also adopted and integrated the key messages of the national strategy for archives developed by The National Archives (TNA) *Archives Unlocked* (2020), namely Trust, Enrichment and Openness.¹
- 2.2 The two most important priorities for the service that emerged from the report are and remain:
 - **Accommodation:** the continuing search for an affordable and long-term solution for the future additional collections storage required by the service. Opened in 1991, DHC is now approaching full capacity with c. 2,400 empty box spaces (of a total 56,000) which is less than 5% of the total. This has developed into a revised capital project plan (see update later in report).
 - **Corporate records:** the Joint Archives Service wishes to deliver on one of its key priorities which is to be the corporate memory of both funding councils. There are significant challenges associated with the transfer of relevant archival material and the service is keen to find ways of ensuring that this happens in both physical and digital formats.

3. Accreditation

- 3.1 The JAS was first accredited by The National Archives in 2018. [Accreditation](#) is a detailed analysis of a service’s performance ranging across organisational health (finance, governance, staffing, policy), collections and stakeholder engagement.

¹ <https://nationalarchives.gov.uk/archives-sector/projects-and-programmes/strategic-vision-for-archives/strategic-priorities/>. This strategy is currently under review by TNA.

- 3.2 The JAS submitted a detailed return in June 2024; this was followed up with a day-long validation visit by two representatives of The National Archives. They met with staff, including senior management, viewed the building and asked questions relating to all aspects of the JAS's activities and performance.
- 3.3 We were pleased to be informed in August that the JAS had been re-accredited. The feedback received "*commended the archive service not only on its own digital preservation but on providing advice and supporting other services to develop their own digital preservation offer. The Panel also noted the service's successful record in attracting external funding to address its cataloguing backlog.*"
- 3.4 TNA's comments also included several 'required actions'. These were:
- As a priority – "*the Panel felt it necessary to stress the need to make real progress in securing expansion space for the storage of collections.*"
 - To improve the service's profile within BCP Council particularly as relates to the acquisition of corporate records
 - To work to reduce the significant backlog of material that is uncatalogued.
 - To review emergency planning and procedures.

The JAS will work wherever possible to implement the above actions – which will be reviewed again by TNA in three years' time in a mid-point 'light touch' review.

4. Service Structure, capacity and building management

- 4.1 The service's core Archives capacity is currently 11.17 fte posts. This reduced by around 1.0 fte following a restructuring of the reception function and the retirement in May 2024 of the long-standing Office Manager. A part-time, fixed-term post of Administrative Officer has been created to deal with all finance, administration and various buildings-related functions. A new History Centre Assistant role has also been created. This will work as part of the existing team and will cover reception functions as well as running the public searchroom. This means that overall, the service has reduced its headcount and implemented a budget reduction resulting from the setting of the 2024/25 budget.
- 4.2 A project archivist joined the service in March 2024 on an 18-month fixed-term contract. This role is fully externally-funded and will oversee the cataloguing of the archive of Thomas Hardy. A second 2-year externally-funded project archivist (Wessex Water) role will start in January. This represents significant additional capacity for the service to address the cataloguing backlog.
- 4.3 Two long-standing members of staff (Office Manager and Principal Archivist) with over 50 years' combined service will have retired by December 2024. The service is very grateful for their hard work and dedication. A successor Principal Archivist has been appointed and will start work in late November 2024.
- 4.4 The JAS continues to support two of its staff who (along with a third from the Records Management team) are undertaking the Level 7 (Masters equivalent)

Apprenticeship in Archives and Records. All three are progressing well and have now commenced the second year of the three-year programme.

- 4.5 The management of the Dorset History Centre building transferred in May from the JAS team to Dorset Council's Assets and Regeneration Department. The Facilities team are therefore regularly on-site undertaking routine checks and overseeing contractor visits.
- 4.6 Large parts of DHC are currently covered in scaffolding. This has been the case since May and work (replacement soffits, fascias, guttering and repository roof) is now significantly over-schedule. The work represents a significant investment in the fabric of DHC by Dorset Council. However, work has been held up due to the fact that Network Rail has control over the granting of permits for any work that takes place within three metres of its boundaries. The DHC site falls into this category. Due to the inability (to date) of the contractor to secure a suitable permit, the scaffolding remains in place until such time as work can continue. The contractors were due to complete at the end of July. We currently have no completion date. DHC has had no car park throughout this period of time and has been unable to receive larger deposits of records due to impeded vehicular access. It is hoped that rapid progress in completing the job can be made once suitable permission from Network Rail is secured.

5. Public Services

- 5.1 The Public Services team have continued to operate with the methods of working established during 2022 and 2023, balancing a booking system for customers accessing original records with drop-in visitors using the library, computer or microform facilities.
- 5.2 A successful recruitment process has taken place for a fifth History Centre Assistant as the team expands to cover the reception desk following a restructuring of staffing in the organisation.
- 5.3 The period October 2023-September 2024 saw a total of 1,563 visitors (a figure broadly comparable to the 1,526 visitors welcomed between October 2022-September 2023. There were a total of 954 pre-booked visitors in this period, a number higher than in the same period the previous year.
- 5.4 The service received a total of 3,151 remote enquiries, received via email or telephone, a number higher than the previous year (3,032).
- 5.5 In this 12-month period we received a total of 222 reprographics orders, drawing in £6,261.80 in the period, a figure lower than the previous year. The average value of each reprographics order is now £28.20.
- 5.6 Staff time has been utilised in a variety of ways in the year to support the services collections management functions. Most notably this involved continuing the library stock audit ahead of the transfer to the new library system (Libraries West) in the early summer. Work to re-catalogue a large collection D-DPC (Dorset Postcards) also took place.

- 5.7 Demonstrating the value of investment in cataloguing, collections catalogued in the last decade continue to be the most popular with customers, with D-BKL (Bankes), NG-HH/CMR (Herrison Hospital), and DC-PL (Poole Borough) being the most requested by customers. Interest in the Thomas Hardy project has contributed to the increased demand for this collection, even as cataloguing continues. Uncatalogued collections such as D-TWA (Sylvia Townsend Warner), D-BAR (William Barnes) and D-FSI (Earl of Ilchester estate) also continue to be popular with customers though more challenging for staff. There has also been increased requests for material from the Dorset Council holdings from different parts of the Council.
- 5.8 The service published 56 blogs across a wide range of subjects. These were often linked to newsletter articles or press releases. There were 274 posts on Twitter/X. Newsletter subscribers have remained steady at around 9,700. Over 2.5 million pages of JAS content were viewed across content on Ancestry and other web services.
- 5.9 The service has contributed various material to national programmes or institutions, including an upcoming BBC programme *Secrets of the National Trust*, where material from the Bankes archive was discussed in relation to ongoing work at Corfe Castle.

6. Museums Advisor for BCP & Dorset Councils²

6.1 Major Redevelopment Planning for Weymouth Museum

The Museums Advisor recently coordinated the submission of a £2.2 million Stage 1 bid to the National Lottery Heritage Fund to provide a safe and secure home for Weymouth Museum's c. 20,000 artefacts within the redevelopment of the historic, harbourside, Brewers Quay site. The collection is currently at risk and the proposed project will provide:

- Long term, environmentally controlled storage for all museum artefacts not on display, with integrated workspace for volunteers to research, document and care for collections.
- Three permanent galleries, covering nearly 300sqm, for the display and interpretation of an eclectic range of art, artefacts and archives from the collection, representing major themes and events from Weymouth's rich history.
- A sizeable temporary exhibition gallery which will provide accessible and progressive, year-round, public programming. This will facilitate both the display of a greater proportion of stored artefacts and the hosting of a diverse range of inspiring exhibitions targeted to both local and tourism audiences.
- A learning and activity space to host school groups, family-oriented holiday workshops, events organised by the Friends of Weymouth Museum and community led initiatives.

All these facilities, together with a museum café, shop and admissions area, will be collectively governed by a 30-year peppercorn lease arrangement. The bid was submitted in August and the outcome will be known in December.

² This role is not part of the JAS funding model, but similarly covers both council areas. It is funded by BCP and Dorset Councils along with South-West Museum Development. Museums development and archives are closely linked and mutually supportive.

6.2 **Delivery of Visit Dorset Museums Marketing Campaign Autumn 2024**

Visit Dorset identified an opportunity for a dedicated investment in a digital marketing campaign, financially supported through UK Shared Prosperity Fund grant, focused on promoting museums in collaboration with the Dorset Museums Association. The campaign is currently being rolled out and will seek to build audiences in the shoulder months. The collective theme is *Inspired by Dorset* – with twelve participating museums showcasing an artist or creative that's relevant to their town or collection. The Museums Advisor has supported museums to generate new displays and county wide events programming to support the delivery of the campaign: www.visit-dorset.com/inspired-by-dorset/. The impact will be evaluated in November 2024.

6.3 **Targeted Support Projects**

Several targeted support projects have been progressed during the past six months including:

- Support with submission and match fundraising for Arts Council MEND grant applications from Dorset museums. The MEND Fund provides large capital grants for non-national Accredited museums to undertake vital infrastructure and urgent maintenance backlogs which are beyond the scope of day-to-day maintenance budgets. Russell Cotes AGM, Nothe Fort and Dorset Museum and Art Gallery are all through to the second round with a collective request of over £2 million. Results will be known in Spring 2025.
- Mentoring the Keep Military Museum, Shaftesbury Abbey Museum and Blandford Fashion Museum with submissions to the Arts Council Accreditation scheme.
- Delivery of displays and events programming within Purbeck's community museums to compliment and amplify Russell Cotes' landmark 2024 exhibition *Artists on Purbeck - The Spirit of Place*, running from 12/10/24- 16/3/25.
- Contributing to Russell Cotes Art Gallery and Museum externalisation to independent trust.
- Leading the Museum Accreditation process for Corfe Castle Town Trust, through the formulation of forward planning and policy development
- Coordinating Visitor Welcome training for North Dorset museums volunteers with support from Tourism South East.
- Advising Nothe Fort on lottery bid development for refreshed interpretation of their "Secret" Nuclear Bunker.
- Support for Langton Matravers Museum in documenting, moving and caring for collections.

7. **Community Engagement**

7.1 The JAS has continued to work on a wide range of community engagement and outreach themes. These include:

Tailored support for a young volunteer with additional access requirements and a summer placement for a recent graduate who intends to go into one of the heritage professions.

- The service has continued its relationship with Dorset's Virtual School which sees cared for children visit DHC for heritage activities.
- In terms of providing training and support for community projects, the service has delivered 3 oral history training workshops, 10 onsite group visits and 5 off-site talks.
- We have held 2 onsite exhibitions; one in partnership with the Dorchester Camera Club and the other as part of the national Heritage Open Day programme. These included tours of the building and saw several hundred visitors come to DHC – many of whom were previously unaware of the service.
- In the last calendar year, the JAS benefitted from 2544 hours of volunteer support which (calculated using Lottery formula) equates to around £50,000 worth of in-kind contribution to the service. The JAS retained around 30 active volunteers, performing roles to support all areas of our work. We have developed our volunteer speakers offer and have a new volunteer helping us to exploring presenting DHC records on story-telling maps. We celebrated Christmas with our volunteers and shared an archaeological walk and afternoon tea in the Summer. Our volunteers supported Collections Fortnight and are preparing to do so again. New volunteers were also recruited to help list correspondence in the Thomas Hardy collection which is currently being catalogued.
- The JAS is sharing newly digitised material with a group of young people with learning disabilities thanks to funding from the Save Our Sounds SW project.
- The service contributed research, planning time and practical support to Dorchester's very successful D-Day Commemoration Story-Trail.
- Building on a long period of engagement, the JAS is collaborating with the Bournemouth Jewish community (the Hebrew and Reform congregations respectively) over the surveying and potential deposit of their records at DHC. The service is drafting and submitting a small bid to Rothschild EU which would support a consultant to survey the records and propose a timetable and plan for transfer and eventual cataloguing.
- The service has continued to provide consultation and support to projects planned by a wide range of community groups and artists including the Cultural Hub for Bournemouth and Poole, Kushti Bok (the Gypsy, Romany, Traveller cultural body), Valise Noire, community archives, a new U3A group, Pavilion Dance SW, Salisbury Diocese, Dorset Ukrainian Response and Windrose Rural Media Trust.

8. Records of Dorset Council and BCP Council

- 8.1 The JAS continues to work with colleagues across both councils to try and ensure that records that should be permanently preserved are transferred to DHC. It remains challenging to secure appropriate material. However, there have been positive conversations with colleagues within BCP Council from Democratic and Children's Services about their records and it is hoped that this will lead to

transfers of archival material in the future. Regular conversations are held with BCP museum and library colleagues and discussions about the appropriate transfer of archives to DHC are on-going

- 8.2 There have been regular transfers of records from Dorset Council's Records Management Service to DHC. Dorset Council's Children's Services has also approved the extension of retention period (to 150 years) of the records of adopted and care-experienced people following the publication of new national [guidance](#) by the Archives and Records Association.

9. Digital Preservation

- 9.1 The consortium of local government and heritage archive services using Preservica digital preservation software, led by Dorset, has grown to 23 members, including most recently The Tank Museum in Dorset. This means that we have achieved the maximum discount available on the annual fee for all members. The current consortium contract with Preservica runs until June 2027.
- 9.2 Since the last service update, the JAS has received had over 100 accessions of audiovisual, photographic, and digital materials. Digital accessions this year have accumulated over 70GB of digital media. Some highlights have been audiovisual and paper records relating to Brownsea Island, donated by one of the first voluntary wardens on the island. Digital accessions include copies of photograph albums of Dorchester Wireless Station in 1940s, oral histories from community (Kushti Bok and Pavilion Dance South West), and a social media campaign on Bournemouth Beach by Led By Donkeys.
- 9.3 As of 9th October 2024, there has been over 34,000 files ingested into Preservica since January, equating to almost 800GB of digital assets acquired by the JAS. Some of this includes the last ingests of adoption records belonging to Dorset Council's Children's Services, which has been given an extension to be retained for 150 years. Within Preservica, this content will be available long-term and accessible. We anticipate that the rate of accession of digital archival content will grow and that the cost of maintaining it within Preservica or another digital preservation platform will increase accordingly.
- 9.4 Alongside other regional local authorities, the JAS is taking part in The Sounds of the South West digitisation project, funded by the National Lottery Heritage Fund. Over 50 audio assets will be digitised at Bristol Archives, with the potential to digitise 100 more items, depending on future funding. This will ensure we are able to listen to at-risk audio materials in the future, by digitising, cataloguing, and ingesting them into Preservica.

10. Conservation

- 10.1 The JAS's conservation officer has continued to maintain high preservation standards within DHC's repositories and to conserve archival materials within the studio. Other work in the last year includes:

- The completion of the Dorset Authors conservation project funded by the National Manuscript Conservation Trust – which included work on the manuscript of Hardy's *Mayor of Casterbridge*.
- Completion of phase two of the externally-funded Railway Plans conservation and digitisation project, providing digital access to damaged and inaccessible documents.
- The provision of conservation support to local museums such as Sherborne Steam and Waterwheel centre and The Keep Military Museum.
- Work for external clients, including the Earl of Shaftesbury and the Arts University Bournemouth.
- Collaboration with Dorset Museum and Art Gallery on the exhibition *Elisabeth Frink: A View from Within*. Material from the Frink archive including photographs, maquettes, and original paintings were loaned. The exhibition is currently on tour to Swindon Museum and Art Gallery before moving on to Salisbury Museum in 2025 helping to give the collection additional visibility and profile.
- Undertaking condition surveys on major collections, including the Gillingham Court Records (a 700-year span which include narratives of the Black Death) and the Wessex Water collection. The latter of which will be conserved as part of the Wessex Water cataloguing project in 2025 with c. £11,000 of interventive conservation.

11. Collections Management

- 11.1 The JAS continues to receive regular, significant accessions of physical archives and has received over 300 accessions in the last year. The most notable recent material to be deposited includes:
- Thomas Hardy letter referring to his design of Athelhampton church, 1916
 - Milton Abbas parish records 1771-1836
 - Loders with Bothenhampton Manor Court Rolls 1746-1925
 - Puddletown Manor Court Roll, 1459
 - Sylvia Townsend Warner manuscript of 'Modern Times'
 - Records of Sandford Orcas Manor, 17th-20th centuries
 - The archive of Poole artist Arthur Bradbury, 20th century
- 11.2 With the addition to the JAS's online catalogue of recent catalogues created by volunteers and staff including the Bournemouth Little Theatre Club Archive, the Sherborne Almshouse Archive, there are now over 400,000 individual catalogue entries available to search.
- 11.3 As part of a wider South-West distribution, the JAS has been granted over £103,000 by [Wessex Water](#) to catalogue, conserve and digitise archives that are held at DHC. These archives have mainly been deposited over the last 20 years with the largest deposits arriving as Wessex Water closed its museum at Sutton Poyntz near Weymouth. The archive consists of several hundred boxes of material covering a 200-year span. The ownership of the collection will transfer to Dorset Council and it is hoped that an archivist will be recruited to begin cataloguing the archive at the beginning of next year.

- 11.4 A successful application was made to the Business Archives Council for their annual cataloguing grant for Business Archives. The service was fortunate to be awarded £5,000 to catalogue the Bournemouth Transport Ltd. (Yellow Buses) archive. This project will start in early 2025.
- 11.5 The service is involved in a range of other projects and fundraising activities to attract more investment into the collections. These involve a public campaign associated with the William Barnes archive, an Exeter University-led project associated with Sylvia Townsend Warner as well as at least two discussions with owners of estate archives about investment in their collections. The service has recently received **two separate pledges of £10,000** to fund work on estate archives it holds. Funding in one case is likely to be recurring over a number of years. It is through such initiatives as these that collections can be catalogued – usually with volunteer support – and thereby made available to the public. Staff at DHC have little spare capacity to work on larger collections so funding of this type is incredibly welcome. Relatively few opportunities exist to gain additional resourcing to catalogue archives and the environment is becoming increasingly competitive, although the JAS has done well in recent times at supplementing core funding with externally-sourced income.

12. Thomas Hardy archive project

- 12.1 The Hardy archive project started in March 2024 and will run for 18 months. This project represents a £70,000 investment in the most high-profile collection held by the JAS. The project archivist has made a good start and is on schedule to complete work to time. A team of volunteers has been recruited to assist work on the c. 5,000 pieces of correspondence within the archive.
- 12.2 An intern funded by the National Trust is working on the project one day a week. This will encourage use of the material gleaned from the archive at Max Gate and the Bockhampton Cottage.
- 12.3 A project steering group has been formed to include key stakeholders. This is proving helpful in determining potential uses of the archive and to ensure collaboration takes place wherever possible. A number of community engagement projects are being discussed.
- 12.4 The service is now the key acquisition body for Hardy archive material. Earlier in 2024 a [manuscript poem](#) was acquired (with grant aid from the Friends of the National Libraries) from an auction house in Chicago. Hardy material regularly comes up for sale and the JAS works hard to acquire appropriate additions to the collection. Since 2020 around £70,000 of externally-funded Hardy material has been acquired for the public collection.

13. Collections fortnight

- 13.1 With the Board's approval, the JAS will now hold an annual 'Collections Fortnight' – a closure period that allows staff to undertake collections-focused work that would otherwise not be possible. Disruption to the public is minimised with early communication about the date and nature of the closure. This year, the

Collections Fortnight will take place from 25 November to 6 December. Planned activities include:

- Sorting and re-ordering the sorting room (where incoming collections are housed) making the space more useable and efficient. This will include the installation of new ceiling tiles in the room.
- Continued audit of repositories including the Film and Sound Archive.
- With help of volunteers beginning repackaging and re-cataloguing work on two collections - D-BLX [Bloxworth estate] and D-SHA [Sherborne Almshouse]
- Additional work on the Hardy archive with the assistance of volunteers.

13.2 A review of the outcomes of the two-week period will be created. Based on the evidence gained from the initial Collections Fortnight, a significant amount will be achieved. It is also planned that the JAS will sell off excess library stock and duplicate Ordnance Survey mapping in early 2025 with any proceeds being invested in the service.

14. Dorset Archives Trust

14.1 Dorset Archives Trust (DAT) remains an important part of the means by which the JAS is able to raise funds and acquire new collections. During 2024 DAT:

- Raised over £24,000 towards the Thomas Hardy archive project
- Funded the purchase of a range of archive material
- Supported a fundraising campaign around the archive of Dorset poet William Barnes
- Purchased conservation equipment
- Acquired its first financial bequest

14.2 DAT trustees are undergoing training which will assist them in understanding how to fundraise more effectively and to engage with the owners of archives over potential transfer to DHC.

15. Capital project

15.1 There has been a short hiatus in activity relating to the JAS's long-term aspiration and need to work on a capital project to provide additional accommodation for physical archives. However, it remains the service's priority to press ahead with a bid to the National Lottery Heritage Fund in 2025 to help fund an extension to DHC. The repositories are now over 95% full.

15.2 In January 2024 Dorset Council's Cabinet signed off on a revised capital programme which included a commitment of £540,000 towards the DHC capital scheme (financial year 2026/27). This sum, although significant, represents about 10% of the cost of the last (2023) iteration of the project. It is very likely therefore that the next project plan will need to be much less expensive and will focus on the provision of additional repository space (22,000 box spaces) alongside a compelling and inclusive activity plan. It is likely also that there will be a significant external fundraising target for the service to reach.

15.3 Recent engagement with the NLHF suggests that there remains strong interest on the part of the Lottery in the JAS project and work will begin in earnest in early 2025 on a revised scheme with an application to Lottery later that year.

16. Conclusion

16.1 The JAS has reviewed and refined its strategic priorities in its 2021-26 service plan. The service continues to work hard to deliver the service plan priorities and to balance its commitments and aspirations against the funding provided by the two councils supplemented by significant externally-generated income.

16.2 In 2025, the service will turn its attention towards a renewed capital project in order to secure the ability of DHC to accommodate physical archives for several decades to come.

Sam Johnston

Service Manager for Archives and Records

1. Financial Implications

All activities described in this report are covered by either the JAS revenue budget, reserve or an externally-sourced grant.

2. Natural Environment, Climate & Ecology Implications

DHC has significantly improved its energy performance through a major project to reduce consumption whilst ensuring the maintenance of high-quality environmental controls. This, combined with the generation of solar energy through PV panels on roof elevations has rendered the building highly energy-efficient.

3. Well-being and Health Implications

The JAS contributes to wellbeing outcomes for both councils and improving the quality of life for residents of BCP and Dorset Council areas and attracting visitors to the county lie at the heart of its work.

4. Other Implications

None

5. Risk Assessment

5.1 **HAVING CONSIDERED:** the risks associated with this decision; the level of risk has been identified as:

Current Risk: Low
Residual Risk: Low

6. **Equalities Impact Assessment**

The JAS has completed a full EQIA. 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.

7. **Appendices**

Appendix 1: Joint Archives Service Plan 2021-26 (updated October 2024)
Appendix 2: Joint Archives Service Strategic Risk Register

8. **Background Papers**

- Public Service Quality Group statistics 2023
- JAS accession records, service statistics and records.
- Accreditation data, 2024
- Archives Unlocked, The National Archives, 2020
- JAS policies, revised 2023
- Previous reports to the JAB

9. **Report Sign Off**

11.1 This report has been through the internal report clearance process and has been signed off by the Director for Legal and Democratic (Monitoring Officer), the Executive Director for Corporate Development (Section 151 Officer) and the appropriate Portfolio Holder(s)

Joint Archives Service

Service Development Plan

2021-2026

DORSET
HISTORY CENTRE

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1

SERVICE DESCRIPTION

The Joint Archives Service (JAS), based at Dorset History Centre (DHC), is operated on behalf of Bournemouth, Christchurch and Poole (BCP) Council and Dorset Council. Partnership between the two authorities as delivered through the joint service sits at the heart of JAS activities and underwrites all aspects of its operation as detailed in the service plan.

The JAS is the county's only accredited archive service as designated by The National Archives. Records Management, HER, Museum Development and Local Studies Library services are operated on behalf of Dorset Council via separate, discrete budgets.

PURPOSE

The Service Development Plan will:

- Articulate the JAS's ambition to excel in its role as custodian of the county's physical and digital archives and records
- Clarify the core functions or 'business as usual' activities of the JAS
- Describe planned projects and/or workstreams over the period 2021-26
- Demonstrate how the service contributes towards the corporate outcomes of the two funding authorities
- Provide key information about the service to enable evaluation and analysis of its performance
- Build on the analysis and recommendations of consultancy report A [Review of the Dorset Joint Archives Service](#) by Elizabeth Oxborrow-Cowan and Associates (February 2021)
- Be regularly updated to reflect the current status of particular activities.

2

VISION, MISSION, & GOALS

OUR VISION

The archival heritage and authentic record of Bournemouth, Christchurch, Dorset and Poole will be preserved by the Joint Archives Service and used to inform, educate and inspire our communities through collaboration and innovation.



OUR MISSION

To acquire, preserve and make accessible the archives of Bournemouth, Christchurch, Dorset and Poole and so promote cultural, economic, educational and social well-being; to act as the corporate memory for the two funding bodies.



OUR GOALS

We will:

- Be an open and innovative organisation, known and trusted by all
- Lead in developing systems and services which enhance the management and care of archives, records and local studies materials
- Increase the use of and access to archives and other heritage assets through a wide range of digital and public engagement activities
- Constantly improve what we do through partnership and collaboration
- Actively promote equality of access to services and the diversity of collections held by the JAS.



3

KEY PRIORITIES

The key priorities of the JAS are to:

- 1** Actively acquire archives relating to Bournemouth, Christchurch, Dorset and Poole and to work through all available means to preserve, conserve and promote access to them to optimum effect
- 2** Design and deliver digital preservation services across both authority areas
- 3** Provide efficient, innovative and quality digital and place-based services which deliver rewarding experiences for all JAS customers and value for money for the two funding authorities
- 4** Engage a wide variety of audiences with digital and physical resources and events, recognising barriers to involvement and working actively to dismantle these
- 5** Encourage and sustain on-site and remote volunteering so adding value through delivering targeted programmes of work
- 6** Develop and maintain partnerships with a range of organisations both public and private and to pursue project opportunities which both enhance funding to the JAS and deliver positive outcomes and mutual benefits to all parties
- 7** Efficiently manage and enhance the DHC building including the provision of sufficient long-term archival storage space (capital project), so increasing value for money for customers, collections and staff

Selected corporate priorities of the funding authorities to whose outcomes the JAS contributes:

BCP Council - A Shared Vision 2024-2028

- Our Place and Environment
- Our People and Communities

Dorset Council – Council Plan (2024-29):

- Communities for all
 - Respond to the climate crisis
 - Grow our economy
- *currently out to public consultation



4

ACTION PLAN

Red Amber Green (RAG) Summary

The total number of workstreams within the current review period of the Service Development Plan is:

Red	1
Amber	4
Green	17
Total	21

For ease of comprehension the JAS's **business as usual** activities are listed adjacent to the workstream with which they have the most affinity.

KEY

Symbols used:	
✓	Completed
G	On track
A	Some minor slippage
R	Delays/ Serious Problems/ Not being Achieved
DF	Deferred



Officers involved in specific workstreams:	
SJ	Sam Johnston, Service Manager for Archives and Records
JH	Jacqui Halewood, Principal Archivist
OS	Owen Simons, Archivist (Collections)
CP/EB	Cassandra Pickavance/Emma Blowers, Archivist (Digital Preservation)
JP	Archive Conservation Officer – Jess Pollard
LD	Luke Dady, Archivist (Public Services)
MG	Maria Gayton, Community Engagement Officer



Service Development Plan: workstreams and projects

Priority 1: Actively acquire archives relating to Bournemouth, Christchurch, Dorset and Poole and to work through all available means to preserve and conserve them to optimum effect;

Business as usual activities:

- Acquisition, appraisal, accessioning, and limited cataloguing of Council, business and community-generated archival material, both hard copy and digital
- Proactive acquisition of Public Records
- Preservation management of collections within passively managed and [environmentally controlled repositories](#)
- Repair and conservation of documents from DHC's own collections as well as via private commissions




	Workstream/Project	Lead	Outcome/Target	Timeframe	Current progress	Rag Status
1.1	Targeted acquisition of archives especially from a range of sources identified through gap analysis.	SJ/ OS	<ul style="list-style-type: none"> • Building up the collection in areas of identified weakness within the DHC holdings. • To better reflect the communities of Dorset and BCP council area. • Adding to the publicly accessible cultural heritage of the county for research on the heritage of the county. • Particular focus on business and artistic archives. 	Ongoing	<ul style="list-style-type: none"> • Potential for consultancy-delivered 'gap analysis' of collections as part of capital bid build up. • Positive engagement with GRT community and Jewish community over their cultural heritage and records. • Depositors strongly encouraged to help fund costs of archive storage. • Need to develop better systems to acquire BCP corporate archives in the absence of an RM service. 	
1.2	Selected purchase of documents (auction etc) using the DAT purchase fund	SJ	Acquiring for public ownership items that would otherwise be sold privately.	Ongoing steady stream of material acquired.	Steady stream of purchases assisted by Dorset Archives Trust https://www.dorsetarchivetrust.org/archives/document-purchases	

	Workstream/Project	Lead	Outcome/Target	Timeframe	• Current progress	Rag Status
1.3	Externally funded document preservation and conservation.	JP	Rendering damaged/unusable documents available for digitisation and public access via projects.	Ongoing – as and when opportunities arise	<ul style="list-style-type: none"> • Completion of National Manuscript Conservation Trust work (£15k grant to work on Dorset Authors). • £30k grants received toward conservation of railway plans; ongoing. • £11k of conservation work in the upcoming Wessex Water project. 	
1.4	Transfer archival content on obsolete and at-risk audio-visual formats and removable digital media to digital preservation system	CP	At risk archives are preserved and remain accessible	By December 2023	Work underway to transfer removable digital media to Preservica. Significant portion of audio-visual formats digitised in 2023. Likely to require resource to transfer remaining audio-visual formats. The JAS is part of a Lottery-funded project ('South West Sounds') relating to the digitisation of sound collections held by the service. The project will also fund a Level 3 apprenticeship placement during 2025.	

Priority 2: Design and deliver digital preservation services across both authority areas

Business as usual activities:




- Raising awareness of digital preservation and offering advice and support to stakeholders generating and transferring digital archives.
- Proactive acquisition of council-generated hard copy and digital records in close collaboration with records management colleagues in both funding councils

	Workstream/project	Lead	Outcome(s)	Timeframe	Current progress	Rag Status
2.1	<p>Fully resourced JAS digital preservation strategy resulting in robust digital continuity for JAS and its clients:</p> <p>http://www.nationalarchives.gov.uk/documents/information-management/understanding-digital-continuity.pdf</p> <p><i>See consultancy report chapter 3</i></p>	CP/SJ	<ul style="list-style-type: none"> • Ensure the accessibility of digital content now and in the future. • Reduction in risk and guarantor of the councils' corporate memories • Collaborative opportunities with other local authorities. • Work with IT and records management colleagues over electronic records management and systems integration. • Preservation of cultural heritage of the county. • Protect investment in digitisation by preserving digital surrogates. 	Ongoing	<ul style="list-style-type: none"> • Longstanding use of Preservica software, now integrated with Epexio re: public access. • Significant ingest of both BCP and Dorset Council records include committee records from Modern.Gov system and adoption records from both councils. • Resourcing challenges as workload in this area grows. • Much work to be done to align proprietary systems (e.g. Planning) with Preservica. Investigating potential of using Preserve 365 which aligns to MS365 functionality. 	
2.2	Local authority consortium using Preservica software. Led by DHC, now includes 23 members in a 5-year contract (to May 2027).	SJ/CP	To deliver cheapest possible price for access to digital preservation software and to share skills and knowledge.	April 2019-present.	<ul style="list-style-type: none"> • Optimum number of members have joined to maximise financial benefits. • Professional network of Preservica users led by DHC is valued and engaged with. 	
2.3	Raise profile and awareness of the practice and benefits of digital preservation within community and other organisations.	CP/EB	To encourage understanding of the importance and relevance of preserving digital content as much as its physical archival equivalent.	Ongoing	<ul style="list-style-type: none"> • Intention is to incorporate a programme of digital preservation training and support into capital project. 	

Priority 3: Provide efficient, innovative and quality digital and place-based services which deliver rewarding experiences for all JAS customers and value for money for the two funding authorities;

Business as usual activities:

- High quality provision of access to original archives and local studies material on-site at DHC
- Processing of enquiries from members of the public relating to a wide variety of subject matter
- Selective digitisation of archival material to enhance access to DHC-held collections and by private commission




	Workstream/Project	Lead	Outcome(s)	Timeframe	Current Progress	RAG status
3.1	Participation in Public Services Quality surveys of archive services	LD	Score of at least 90% 'satisfied' or 'very satisfied'	2024 (biennial)	Survey currently (October 2024) underway with results available later in the year.	
3.2	Archive Accreditation	SJ/AI I	Meet the standard set by The National Archives covering wide range of service activities and functions. Tied to appointment as a suitable Place of Deposit for Public Records	Full accreditation review in 2024	Service fully re-accredited in July 2024 following review by The National Archives	
3.3	Continue to develop Epexio archive catalogue and its links to Preservica together with public front end. <i>See consultancy report chapter 4</i>	JH/ LD/C P/OS	To increase the quality and varied means of access to a greater quantity of DHC-collections online. More publicly available collections-related data, including access to digital material through Preservica. (See also Priority 2)	Business as Usual	Continue on-site volunteering to enhance catalogue. Remote volunteering via Epexio improves quality of customer access to collections and offers wider volunteering experience. Further functionality development: <ul style="list-style-type: none"> • Provide paid for access to digital archives • Geolocation of collections to facilitate map based searching • Now holds over 400,000 entries 	

3.4	<p>Further investigate development of online mapping resource such as Know Your Place or similar working with Historic Environment Service (now integrated into the Archives and Records Service).</p> <p><i>See consultancy report chapter 4</i></p>	JH/ LD	<p>Enhanced access to collections. Potential to link to other SW resources</p>	<p>We hope that this will form part of the capital project delivery.</p>	<p>Potential to form part of NLHF-funded capital project public engagement programme or to be actioned as a standalone project for which external funding could be sought. Geotagging volunteers have been adding data to the base map e.g. sales particulars relating to properties.</p>	A
3.5	<p>2 members of JAS staff will be developed via the Level 7 Apprenticeship (3 years) funded through the Apprenticeship Levy.</p>	LD	<p>Staff development and professional progression via national scheme (led by The National Archives).</p>	<p>2023-2026</p>	<p>Good progress and all three apprentices are now into the second year of the programme. Will reduce capacity within the public service team due to 1 day per week study implications. SW cohort includes a member of DC's Records Management team.</p>	G



Priority 4: Work with a wide variety of audiences and through public engagement and advocacy to raise the profile of DHC, to encourage access to and appreciation of the archival resource;

Business as usual activities:




- Delivery of outreach services including talks, project design, workshops, tours and engagement with stakeholders, educational institutions and community groups
- Provision of digital services including the online catalogue, website, social media, blogs and material hosted by Ancestry.co.uk

	Workstream/Project	Lead	Outcome(s)	Timeframe	Progress	RAG status
4.1	Continue to work with the Cultural Hub and the Cultural Education Partnership	JH/ MG	To identify opportunities to work with BCP schools, other cultural providers and creatives to develop stimulating resources for engagement with archives in educational settings.	Ongoing	Innovative mixed media resource developed and delivered Contributions to schools' 'artist in residence projects'	
4.2	Community engagement - support and facilitation for a range of externally-resourced groups and projects to enhance access to and enjoyment of archival heritage.	MG	Positive engagement with a range of groups and subject matter. Value of archives as source material for a wide span of uses.	Ongoing – ad hoc Ongoing – ad hoc and subject to individual project schedules	Groups include: <ul style="list-style-type: none"> • Bournemouth Jewish community • Telephone Friendship Group • Valise Noire • Gypsy, Romany, Traveller (Kushti Bok) • Bridport Arts; Poole Lighthouse 	
4.3	Digital promotion, advocacy and outreach, through a range of social media platforms and DHC presence on DC & BCP corporate websites and intranets. <i>See consultancy report chapters 3 & 4</i>	LD/JH	<ul style="list-style-type: none"> • Raise the profile of DHC to customers and stakeholders • Provide detailed information on DHC and first point of contact • Attract new audiences • Help to sell services and generate income. • A Digital Development Strategy 	Ongoing	Primarily delivered via blogs, newsletter and Twitter/X.	



Priority 5: Increase and sustain on-site and remote volunteering so adding value through delivering targeted programmes of work;

	Workstream/Project	Lead	Outcome(s)	Timeframe	Progress	RAG status
5.1	Developing a strong on-site and remote volunteer programme. <i>See consultancy report chapter 3</i>	OS/JP/MG/LD/CP	<ul style="list-style-type: none"> Delivering critical 'added value' capacity, sorting, repackaging, listing collections and for Community Engagement projects Involving the community in the life of DHC and its collections. Includes work experience opportunities for young people. Wider range of projects for volunteers to engage with (digitisation, research, oral history, conservation, cataloguing, collections indexing). 	Ongoing and review annually	<ul style="list-style-type: none"> Remote volunteering opportunities delivered via Epexio, e.g. geo-tagging. JAS has started to refine and grow its volunteering programme post-Covid and in the light of technological change. Maintain standards gained through Investors in Volunteers. Volunteering numbers have recovered post-Covid. New volunteer cohort via Hardy project 	
5.2	Dorset Archives Trust (DAT) www.dorsetarchivestrust.org	SJ/JH	<p>Mobilising the effective support of DAT for DHC projects through its 3 key priorities:</p> <ul style="list-style-type: none"> Fundraising Collections development Advocacy 	Ongoing annual review Annual review prior to AGM	<ul style="list-style-type: none"> Membership steadily increasing. Events programme based around archive collections. Documents purchased Training for trustees 	

Priority 6: Develop and sustain partnerships with a range of organisations both public and private and to pursue project opportunities which both enhance funding to the JAS and deliver mutual benefits;

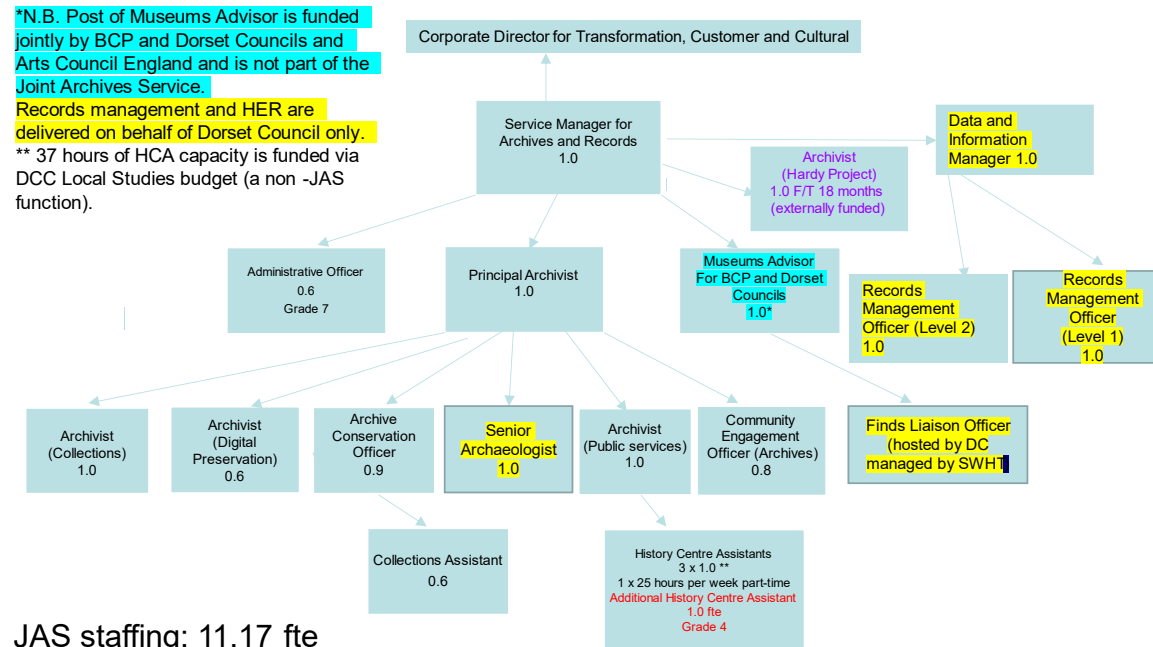
	Workstream/project	Lead	Outcome(s)	Timeframe	Current progress	Rag Status
6.1	Seek external funding for collections related projects including cataloguing, conservation and selective digitisation	SJ/JH	<ul style="list-style-type: none"> • Make large quantities of new material available to the public. • Assist preservation through digital facsimiles; • Increase the JAS's online presence via catalogue and other digital tools. • Complement scarce core resources. 	Ongoing, but subject to available funding opportunities and programmes	<p>Reliant upon opportunities to seek funding through either public or private sources.</p> <p>Collections with funding secured or being sought:</p> <ul style="list-style-type: none"> • Wessex Water - £103k • Yellow Buses - £5k • Quarter Sessions (capital project) • 'Dorset Authors' (Barnes, Townsend Warner) – fundraising underway • Dorset estates – potential funding opportunities 	
6.2	Thomas Hardy archive project	SJ/project archivist	<ul style="list-style-type: none"> • Internationally important collection • £70k investment • Partnership support • Potential Designation application with Dorset Museum 	March 2024-August 2025	<ul style="list-style-type: none"> • Project successfully underway and on target • National Trust internship 1-day per week • Steering group to engage partners • Academic engagement 	
6.3	Investigate partnerships with academic institutions to better exploit DHC-held collections and encourage student and academic interest in archives.	SJ/OS/JH	<ul style="list-style-type: none"> • Strong links to regional HE institutions • Possible collaborative projects • Opens up new potential sources of funding through external grants. 	Ongoing; annual review of MoUs and project opportunities via academic departments.	<p>Positive activities:</p> <ol style="list-style-type: none"> Project links to Exeter university over the archives of Thomas Hardy and Sylvia Townsend Warner. Links with AUB re: Poole Pottery and Frink archives Opportunities emerging with BU and its BA in Public History – work experience and extended project placements. MoU signed in 2020 with University of Exeter. Student travel fund (DAT). 	

Priority 7: Efficiently manage and enhance the DHC building including the provision of sufficient long-term archival storage space, so increasing value for money for customers, collections and staff;

	Workstream/project	Lead	Outcome(s)	Timeframe	Current progress	Rag Status
7.1	Capital project; extension of DHC building to ensure adequate future space for collections. <i>See consultancy report chapter 6</i>	All	<ul style="list-style-type: none"> • Ensure appropriate storage is available for the next 25-30 years of hard copy archive acquisition. • Ensure that the best value 'full life' solution is agreed. • Wide programme of public and community engagement across the county (if NLHF-funded). • Improve public access to the building 	Early 2025-	<ul style="list-style-type: none"> • Dorset Council has committed £540,000 in its capital programme (2026/27). • New Expression of Interest to NLHF will be submitted within the next 3 months and a new capital project plan developed to frame a bid to the Lottery in 2025. 	
7.2	Take part in Dorset Council energy efficiency initiatives and projects. Pursue the improvement of the fabric of the DHC building	SJ/JH	To improve fabric and energy consumption in DHC building – (heat pump and low energy lighting, roof and facias and soffits, lift)	Ongoing	<ul style="list-style-type: none"> • DC has been awarded funding for improved energy efficiency projects. • New PV solar arrays added to DHC roof summer 2022. 	

5. Service structure

Archives and Records Service Structure – October 2024



JAS staffing: 11.17 fte
 JAS project staffing: 1.0 fte

5. Risk Register

September 2024
Archives Service Strategic Funding
(Risks have been listed in order of severity)

Risk Scoring	Impact	H	6	8	9
L = Low		M	3	5	7
M = Medium		L	1	2	4
H - High				L	M
			Probability		

Risk No.	Risk Description	Likely Impact if Risk Occurs	Impact H/M/L	Probability H/M/L	Score	Counter Measures	Comment
1	Core Funding: continued risk to local government funding from 2025/26. This will need to be factored into the JAS's ability to maintain current levels of service delivery.	Further reductions in standards, levels and capacity of services offered by JAS - potentially taking it below the minimal effective level through the loss of distinct functions	H	H	9	Consultants' report indicates few obvious additional sources of revenue not already accessed. Ensure understanding of value for money through benchmarking and TNA Accreditation. Importance of digital preservation in supporting business continuity and will require increased resourcing in the future.	Standstill budgets in 8 out of 10 previous years. Inflationary pressure specifically from national pay agreement, energy and business rates rise. Important to gauge the views of the two unitary councils on the role and priorities

2	Failure to develop preferred option to provide extra space for JAS collections	Finite and diminishing space within repositories (95% capacity). DHC would, in time, have to start refusing material. Failure to preserve corporate memory or Dorset's heritage. Potential revenue cost implication if space has to be rented.	H	H	9	<p>Agreement over capital match funding by DC - £540k in 2026/27.</p> <p>Full life cost of DHC extension is the cheapest solution. External storage would be much more expensive in the long term.</p>	Project will be pursued in early 2025
3	Funding for digital preservation is not continued and work concludes without long-term sustainable solution.	Failure to provide digital preservation services for funding authorities and wider community. Information loss and/or data corruption. Potential legal implications.	H	M	7	<p>Prove the long-term benefits of digital preservation and the risks and consequences of not having such a system. Consortium model has halved costs to each member. Need BCP Council to adopt digital preservation via Preservica.</p>	<ul style="list-style-type: none"> • The JAS is leading the local authority sector in working on digital preservation. • Information loss/corruption is a major risk to the corporate memory of both authorities. • Evidence of growing understanding of digital preservation and its benefits.
4	Dorset Archives Trust: failure to sustain Dorset Archives Trust due to lack of external interest and low capacity to support from within DHC.	No revenue impact; loss of support in communities, harm to reputation and loss of potential for special projects and funding to benefit Dorset's archives.	M	L	3	<ul style="list-style-type: none"> • Cultivate new trustees to strengthen body. • Ensure alignment of DHC activities and those of DAT. 	<p>Body increasing in confidence and understanding. First legacy has been secured in 2024. Very positive results in terms of fundraising.</p>