

**HERTFORDSHIRE COUNTY COUNCIL**

**EDUCATION, LIBRARIES AND LOCALISM CABINET PANEL  
TUESDAY, 5 JUNE 2018 AT 10:00AM**

**‘SHARED HERITAGE’ STRATEGY: INFORMATION UPDATE**

*Report of the Director of Resources*

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**1. Purpose of report**

This paper provides an update to the Heritage Services Strategy paper presented to the Public Health, Localism and Libraries Panel in March 2016. It provides an update on the implementation of the ‘Shared Heritage’ Strategy two years on from its introduction.

**2. Summary**

- 2.1 ‘Shared Heritage: the future of Hertfordshire’s past 2016-2026’ was agreed by Panel in March 2016 to provide a vision and direction for Heritage Services over the next ten years. It sets out a number of key actions to deliver vibrant and sustainable archives, local studies and museums development.
- 2.2 Hertfordshire Archives and Local Studies (HALS) opening hours were reviewed and changes implemented following public feedback from July 2017.
- 2.3 HALS achieved Archive Accreditation status in July 2017.
- 2.4 Some short-term storage improvements have been made, and the air conditioning project work for the outstore (located under the carpark at County Hall) has been completed.
- 2.5 Work to plan for the long term storage and premises needs of the service has started, and a feasibility study for a new Archive Centre for Hertfordshire has been commissioned by Herts Property.
- 2.6 Technological developments include new digital microfilm scanners introduced at HALS, and rolled out to specific libraries in line with their refurbishment programmes; an upgrade to the Herts Memories network of websites; completion of a pilot project for digital preservation; and the launch of new e-store and archive catalogue search facility.
- 2.7 HALS digitisation programme has been expanded in response to customer feedback and work has started on the next large scale map digitisation project.
- 2.8 Opportunities for access and community involvement have been extended through co-creation and partnerships, and through volunteering programmes.
- 2.9 Promotion and marketing have been improved through the introduction of an e-

newsletter, social media and promotional campaigns.

- 2.10 A number of new income generating services have been introduced and Heritage Services has taken steps to realise and identify savings from its annual revenue budget in order to meet the contribution of £75,000 required by 2018/19.

### 3. Recommendation

Panel is asked to note and comment upon the progress made in implementing the Shared Heritage strategy.

### 4. Background

- 4.1 'Shared Heritage: the future of Hertfordshire's past 2016-2026' was presented to the Public Health, Localism and Libraries Panel on 9 March 2016 to set the vision and direction for Heritage Services over the next 10 years. The strategy set out priorities for Heritage Services to ensure vibrant and sustainable services. It responds to the changing needs of customers, technological challenges and opportunities, and the need to meet the requirements for archive preservation within the context of continuing pressure on local government budgets.
- 4.2 'Shared Heritage' is based around three themes:
- **Ensure preservation** - caring for Hertfordshire's archives and historic collections in accordance with required legislation and standards, to make them fully available for current and future generations to use and enjoy, in modern, welcoming, premises.
  - **Exploit technology** - to improve services and meet customer needs, through online services, increased access to digitised records and preservation of digital archives.
  - **Embed heritage in the life of the community**, working in partnership to extend opportunities for access, learning and involvement in ways that support citizens to live healthy fulfilling lives in thriving communities.
- 4.3 Heritage Services includes **Hertfordshire Archives and Local Studies (HALS)** which cares for the county archives and county local studies collections, with integrated services for access and preservation, based at County Hall; **local studies in libraries** across the county and the **Museums Development** service. Together they have a shared mission to preserve and promote resources for the study and enjoyment of Hertfordshire's unique heritage for the personal, community, social and economic benefit and wellbeing of Hertfordshire's citizens.
- 4.4 HALS fulfils the County Council's statutory responsibility under Section 224 of the Local Government Act 1972 for preservation and access to records, and services are delivered in accordance with legislation, and national standards.
- ### 5. Revised opening hours
- 5.1 HALS opening hours were reviewed in January 2017 to realign services and resources to meet changing patterns of use. Customers were asked for views on options for opening hours and digitisation priorities, alongside the regular archive visitor survey organised by the Archives and Records Association and the Chartered Institute of Public Finance and Accountancy. The survey ran for six weeks from 17 October 2016 at HALS; the opening hours and digitisation questions were also available on the Council website and advertised in the e-newsletter. 308 responses were received.
- 5.2 Following analysis of customer feedback, changes were implemented from 1 July 2017 which enabled HALS to re-focus resources on digitisation, cataloguing and

other services for remote customers, including income generating services, whilst making some savings.

### 5.3 HALS new opening hours are:

Mon: Closed

Tue: 9:00am-5:00pm\*

Wed: 9:00am-5:00pm

Thu: 9:00am-5:00pm

Fri: 9:00am-12:30pm

Sat: 10:00am-2:00pm twice a month (first and third Saturday of the month)

\*evening opening by prior appointment once a month (first Tuesday of the month)

## 6. Archive Accreditation

6.1 Hertfordshire Archives and Local Studies (HALS) achieved Archive Service Accreditation (which lasts 6 years) in July 2017. This UK wide quality standard replaces the previous framework for assessment of archive services. HALS is required to seek and retain Accreditation in order to fulfil statutory obligations and retain status as a Place of Deposit.

6.2 The key findings of the assessment for HALS were summarised in the following three points:

- A local archive service committed to delivering good service and value to its communities
- HALS has made excellent use of opportunities to develop its service provision in past years, but progress to develop the service more fully may be hindered without further investment in physical and digital storage facilities for the future.
- A strong professional and knowledgeable workforce committed to developing digital skills and knowledge, which is keen to maximise the service's assets through fundraising opportunities

6.3 An action plan lists required actions which need to be addressed to maintain accreditation in future. These include implementation of a full fundraising strategy, moving forward with digital storage and preservation plans, and developing plans for new accommodation to allow modern and flexible service delivery.

## 7. Archive storage and premises

7.1 It will be necessary to plan for, and take steps to secure, the long term storage needs of the service. HALS is currently accruing physical archives at a rate of an average of 10 cubic metres per year. Current estimates project that there is sufficient space for archive collections for approximately 6-8 years. There are also challenges in maintaining the quality of the current storage space at County Hall to ensure it is fit for the purpose of storing of archive materials to required standards.

7.2 HALS has continued to progress small scale improvements to improve preservation and public facilities in the short term. Additional plan chests have been installed. Air conditioning project work for the outstore (located underneath the main carpark at County Hall) has been completed.

7.3 The limitations of a 1930s listed building continue to have a significant impact and it is increasingly difficult to operate effectively in the current premises. From 2015 to 2017, HALS incurred £22,800 additional expenditure from the service budget (excluding property costs), resulting from unplanned building issues, and a significant amount of staff time (averaging 37.5 hours per week) has been diverted from other service priorities. This problem is not unique to Hertfordshire, and there

are numerous examples in recent years, where authorities have sought to modernise or relocate archives and local studies services into more flexible, tech-enabled accommodation, suitable for the provision of a 21st Century service. This would not only improve services to customers but also enable more efficient deployment of staff. Heritage Services will need to seek capital investment (for property and ICT) to support the ambition to develop services and improve premises, as well as actively exploring opportunities to relocate to more suitable premises.

- 7.4 Work to plan for the long term storage and premises needs of the service has started. In November 2017, a site visit took place to the new Herefordshire Archives, built according to the Passivhaus standard. A feasibility study has been commissioned by Herts Property to take forward plans to develop the specification for a new archive building.

## **8. Developing technology**

- 8.1 Technological developments have improved services for customers and increased access to digitised records.

### **8.2 *Digital microfilm scanners***

Five new digital microfilm scanners were installed in the Local Studies Library at HALS to replace increasingly obsolete microfilm readers. The new equipment has been received positively by customers and provides superior viewing and higher quality printed copies. Two staff scanners support HALS copying service; extending the services available to include digitising customers' own microfilm/fiche. New microfilm scanners have also been rolled out in line with library refurbishment plans to improve digital access to local studies microfilm, starting with two scanners at Watford Library. The scanners have the ability to save digital copies – a permit scheme and charges have been developed.

### **8.3 *Herts Memories upgrade***

Work was undertaken to modernise the Herts Memories community archive network websites (originally created in 2009) which collect 'informal' history, enabling communities to tell their own stories. The design was refreshed and all sites were migrated to the new WordPress platform by the end of March 2017.

### **8.4 *Digital Preservation pilot***

HALS took part in an East of England Regional Archive Council (EERAC) pilot project exploring collaborative approaches to digital preservation of 'born-digital' archives. Led by Norfolk County Council, funded by EERAC and The National Archives, the project investigated the use of Archivematica and associated open source systems.

### **8.5 *E-store and catalogue search***

A new e-store for the Heritage shop and customer friendly interface for the archive catalogue search was launched in January 2018. This work developed from the corporate E-commerce project and offers additional features for cross-selling shop products and for displaying catalogue search results via a timeline and map facility, the ability to add promotional articles and develop online donations.

### **8.6 *Digital Transformation***

The e-store project has been the first phase in the planned digital transformation of HALS services. The next phase will start in 2018/19 with the further development of the Orangeleaf system (which provides the e-store and catalogue interface) to address 'reader order management' with streamlined copying and document ordering, customer accounts and image download.

## **9. Digitisation programme**

- 9.1 HALS digitisation programme has been expanded in response to customer feedback. Survey results confirmed a strong interest in digitisation, with maps, photographs and images, newspapers, parish registers and wills the most popular priorities (in order). Work has started on the next large scale map digitisation project. Inland Revenue maps have been conserved and prepared for digitisation, with over 500 maps digitised so far. A new volunteer project to record information about local studies images has also started. These two large scale projects are in addition to ongoing digitisation of police records, Herts Yeomanry photographs and scanning of images.

## **10. Co-creation, partnerships and learning**

- 10.1 Learning activities, events and opportunities for community involvement have been extended through co-creation, partnerships and volunteering. This approach has increased the diversity of exhibitions and events; HALS has raised awareness of services by attending community heritage events. Five out of the last six exhibitions displayed at HALS have been delivered with the support of partnership projects or other external funding.
- 10.2 Partnership projects which have provided additional opportunities for exploration and enjoyment of Hertfordshire's heritage include the *'Seeing it Through'* community history project, funded by the Heritage Lottery Fund (HLF) led by Pins and Feathers theatre company in 2016, and in 2017-2018 *'Traditional Hertfordshire'*, (funded by HLF) and the museums *'Explorer Passport'* project (funded by Arts Council England), both led by the Museums Development team.
- 10.3 A new promotions volunteer role was introduced at HALS and funded projects have led to a range of project based volunteer activities – oral history and video editing, research, scanning, repackaging and listing archive photographs and documents. In 2017/18, 151 volunteers contributed a total of 8989 hours by assisting with listing and indexing documents, preservation, digitisation, promotion and community archives.

## **11. Improved promotion**

- 11.1 'Shared Heritage' highlighted the need to improve promotion and marketing to ensure residents and visitors are aware of the wide range of services and resources available to them. 'Shared Heritage' strategy priorities have been shared with stakeholders, partners and major donors/depositors.
- 11.2 A new archives and heritage e-newsletter was introduced through the County Council's 'Update Me' facility, which now reaches 5,450 subscribers with an average of 1200 unique opens per month.
- 11.3 Good use has been made of social media – Herts Archives Twitter now has 2,235 followers and Facebook advertising has been used in relation to funded projects.
- 11.4 Heritage Services have worked closely with Corporate Communications and the wider Libraries service to increase promotion; this has included a successful family history campaign online and Horizons articles. Participation in the national 'Explore your Archives' campaign has increased the number of opportunities for customers to learn about and enjoy local history and heritage.

## **12. Increased income**

- 12.1 A key element of 'Shared Heritage' involves taking a positive and proactive approach to fundraising and developing income streams, to support the growth of income sustainably over a period of time.
- 12.2 Several new services have been developed by HALS and have started to generate new income. These include conservation, digitisation and copying of customers' own records; room and space hire, promoted to local history societies and groups; and the new permit scheme for using digital microfilm scanners. New OCR (optical character recognition) software has been installed to enhance the digitisation offer.
- 12.3 Donation boxes have been installed in each of HALS reading rooms to encourage private giving. Smaller portable boxes are now taken out on outreach activities. Donations are requested at HALS free events and this is mentioned in event publicity. An online donation facility has been included in the new e-store.
- 12.4 The membership structure and fees for Hertfordshire Association of Museums were revised in 2017 and now offer an associate membership category.
- 12.5 In 2017/18, income contributed a total of £51,799 to the Heritage Services budget.

## **13. Performance**

- 13.1 In 2017/18, Hertfordshire Archives and Local Studies received 6,591 research visits, with 20,627 documents retrieved (and returned to) archive storage. There were 289,104 virtual visits to HALS website and network resources. A further 2,255 customers took part in events and learning activities. The team received 25,954 enquiries last year including requests for research, copies and reproduction rights.
- 13.2 The Museums Development team provide support and advice to museums across the county, including through Hertfordshire Association of Museums which currently has 29 members.

## **14. Financial implications**

- 14.1 Hertfordshire Archives and Local Studies revenue budget for 2018/19 is £592k.
- 14.2 The total budget for Museums Development in Hertfordshire is around £55k, of which the County Council contributes around £28k. This helps us to leverage an additional £26k in annual grant funding from SHARE Museums East. Other grant funding for projects varies annually. Around £1,500 comes from subscriptions to Hertfordshire Association of Museums.
- 14.3 Heritage Services have contributed £75,000 towards annual savings targets since 2016/17. These savings have been achieved by reducing revenue expenditure and increasing income, and delivered as follows:
  - 2016/17 - £15k
  - 2017/18 - a further £30k
  - 2018/19 - a further £30k
- 14.4 Local Studies materials (books, maps, microfilm) in libraries and at HALS are funded from Hertfordshire Libraries materials budget which has been reduced in line with savings proposals for 'Inspiring Libraries'.
- 14.5 'Shared Heritage' is a ten year strategy, service developments will be made as

resources allow. Heritage Services will need to seek capital investment (for property and ICT) to support the ambition to develop services and improve premises, as well as actively exploring opportunities to relocate to more suitable premises. This will include investigating a bid for Heritage Lottery Funding to support these aspirations.

## **15. Equalities Implications**

- 15.1 When considering proposals placed before Members it is important that they are fully aware of, and have themselves rigorously considered the equality implications of the decision that they are making.
- 15.2 Rigorous consideration will ensure proper appreciation of any potential impact of that decision on the County Council's statutory obligations under the Public Sector Equality Duty. As a minimum this requires decision makers to read and carefully consider the content of any Equalities Impact Assessment (EqIA) produced by officers.
- 15.3 The Equality Act 2010 requires the County Council, when exercising its functions, to have due regard to the need to (a) eliminate discrimination, harassment, victimisation and other conduct prohibited under the Act; (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it and (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it. The protected characteristics under the Equality Act 2010 are age; disability; gender reassignment; marriage and civil partnership; pregnancy and maternity; race; religion and belief; sex and sexual orientation.
- 15.4 As 'Shared Heritage' is progressed, individual EqIAs will be developed as required for specific initiatives and service changes. An EqIA for the implementation of HALS revised opening hours was undertaken (attached as Appendix A).

## **16. Next steps**

- 16.1 Implementation of the 'Shared Heritage' strategy will continue to build on progress made so far. 2018/19 will see particular focus on next steps towards securing new premises and the further development of Heritage Services Fundraising Strategy. This will include investigating a suitable model to support ongoing fundraising and income generation, such as a development trust or charitable incorporated organisation.
- 16.2 Further papers will be presented to the Panel as and when specific changes to the service are proposed, and where required, these will be subject to public consultation in line with County Council policies.

## **17. Background papers**

['Shared Heritage' Strategy](https://www.hertfordshire.gov.uk/media-library/documents/libraries/hals/shared-heritage-strategy-june-2016.pdf) - <https://www.hertfordshire.gov.uk/media-library/documents/libraries/hals/shared-heritage-strategy-june-2016.pdf>

['Shared Heritage: the future of Hertfordshire's past – Developing a strategy for Heritage Services 2016-2026'](https://cmis.hertfordshire.gov.uk/hertfordshire/Calendarofcouncilmeetings/tabid/70/ctl/ViewMeetingPublic/mid/397/Meeting/431/Committee/50/SelectedTab/Documents/Default.aspx) - <https://cmis.hertfordshire.gov.uk/hertfordshire/Calendarofcouncilmeetings/tabid/70/ctl/ViewMeetingPublic/mid/397/Meeting/431/Committee/50/SelectedTab/Documents/Default.aspx>

[Archive Accreditation](http://www.nationalarchives.gov.uk/archives-sector/archive-service-accreditation/) - <http://www.nationalarchives.gov.uk/archives-sector/archive-service-accreditation/>

[HALS e-store and catalogue search - https://archives.hertfordshire.gov.uk/](https://archives.hertfordshire.gov.uk/)