



A2A Phase 3 Planning Workshops

Autumn 2003



Objectives

- Understanding the wider A2A framework
- Learning how to address HLF priorities and criteria
- Gaining confidence in presenting clear and accurate budgets
- Gathering tips on bid presentation



A2A programme

- A virtual archives catalogue for England
- Part of UK National Archives Network
- 700,000+ pages of mainly paper based finding aids retroconverted into electronic form by March 2004
- Available from one site www.a2a.pro.gov.uk, one powerful search engine

A Access
2 to
A Archives

A2A home page



The screenshot shows the A2A home page with a navigation bar, a search box, and several informational sections. The navigation bar includes links for Home, Search A2A, About A2A, New A2A Users, Family History, Research Interests, Useful Links, and Contact Us. The main content area features a 'Welcome to A2A!' section, a 'What's New?' section, and a footer with logos for the British Library, the National Archives, the Heritage Lottery Fund, and ISB. A photograph from the Henriques family collection is also visible in the bottom right corner.

A Access
2 to
A Archives

The English strand of
the UK archives network

Search the Database

[Home](#) | [Search A2A](#) | [About A2A](#) | [New A2A Users](#) | [Family History](#) | [Research Interests](#) | [Useful Links](#) | [Contact Us](#)

[Troubleshooting](#) | [Site Map](#)

Welcome to A2A!

The A2A database contains catalogues describing archives held throughout England and dating from the 900s to the present day. Click the Search button to [search these catalogues](#).

A2A does not yet offer a full description of *all* the archives in England, but it is regularly updated, so **revisit often** for newly-included catalogues.

September 2003 is [Archive A2A](#)

A2A usage since launch: **2.2 million** searches / **4.6 million** catalogue downloads

What's New?

The A2A database was last updated on **1 September 2003** and currently contains over **5.1 million** catalogue entries from [327 record offices](#) and other repositories.

For more details see the list of catalogues which are [new this month](#) or the latest news from the Central Team: [A2A Update](#)
For information on what to look out for in the future, see [A2A Projects in Progress](#)

BRITISH LIBRARY
the national archives

Supported by the
Heritage Lottery Fund

ISB

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 archive awareness month

Photograph from the collection of the Henriques family of Manchester, c.1880. © [Documentary Photographic Archive](#) at Greater Manchester County Record Office, ref. 1068/52





A2A programme

- TNA and BL are lead bodies
- External funding:
 - for centre from HM Treasury (£697,000 from ISB)
 - for content projects from HLF (£2m+): 100% success rate for bids so far
- Central team working with consortia, single repositories, user organisations
- Partnership funding from centre



A2A principles

- Public access to heritage
- Education
- Social inclusion
- Regionalism
- User participation
- Common standards



A2A benefits

- Of central organisation
- To users
- To contributors
- In terms of access



A2A challenges

- Strict timetable
- Closely defined parameters
- HLF application form
- Steep learning curve
- Bulge period in Phase 1



A2A Phase 3

- 15 months, April 2004 – July 2005
- Equivalent of 150,000 catalogue pages, c 14 projects
- New participants
- User participation
- Regional consortia, smaller groups or single institutions
- HLF Your Heritage programme: **bids in by December 2003**



A2A Phase 3

- Retroconversion
- New cataloguing/catalogue improvement
- Interpretation
- Digitisation
- Mix and match

Long Term Vision: Content

- A2A Phase 1 and 2: 700,000+ catalogue pages will be available online
 - = c 28% of UK catalogues outside TNA
(source: HMC/NCA, 2001)
- Phase 3: A2A aims to add 150,000 more
 - approx another 6% making a total of 34%



Long Term Vision: the national network

- A2A co-operates with other network strands and networking projects:
 - Archives Hub, AIM25, SCAN
 - HE, local government and other initiatives
- Common searching, interoperability, cross domain...
- Regional and local developments

Your Heritage

- Light touch, low risk projects
- Shorter application process – 3 months
- Less information needed for submission but more targeted
- Desk top assessment at HLF
- Sign up to contract at the beginning



Project presentation

- Executive summary
- Presentation tips
- A2A clearly branded in the title
- See

www.pro.gov.uk/archives/a2a/workshop_tips.htm

Project Need and Description

The problem

Needs and Desires

(evidence to support this)

Project Description

The solution

Features and Benefits

(most appropriate solution)

Project description

- Spell out what is being done
- Mention the page count and the A2A context
- 'The grant will cover...' list the key main budgetary headings eg staff, equipment, office overheads, exhibition, leaflet and user days.

Outreach and publicity

- Integral to the project
- Publicity - leaflet, posters and 'exhibition' are the bottom line
- Outreach - need to consider the activities and participatory events – audience development, interpretative materials and actual **activities**



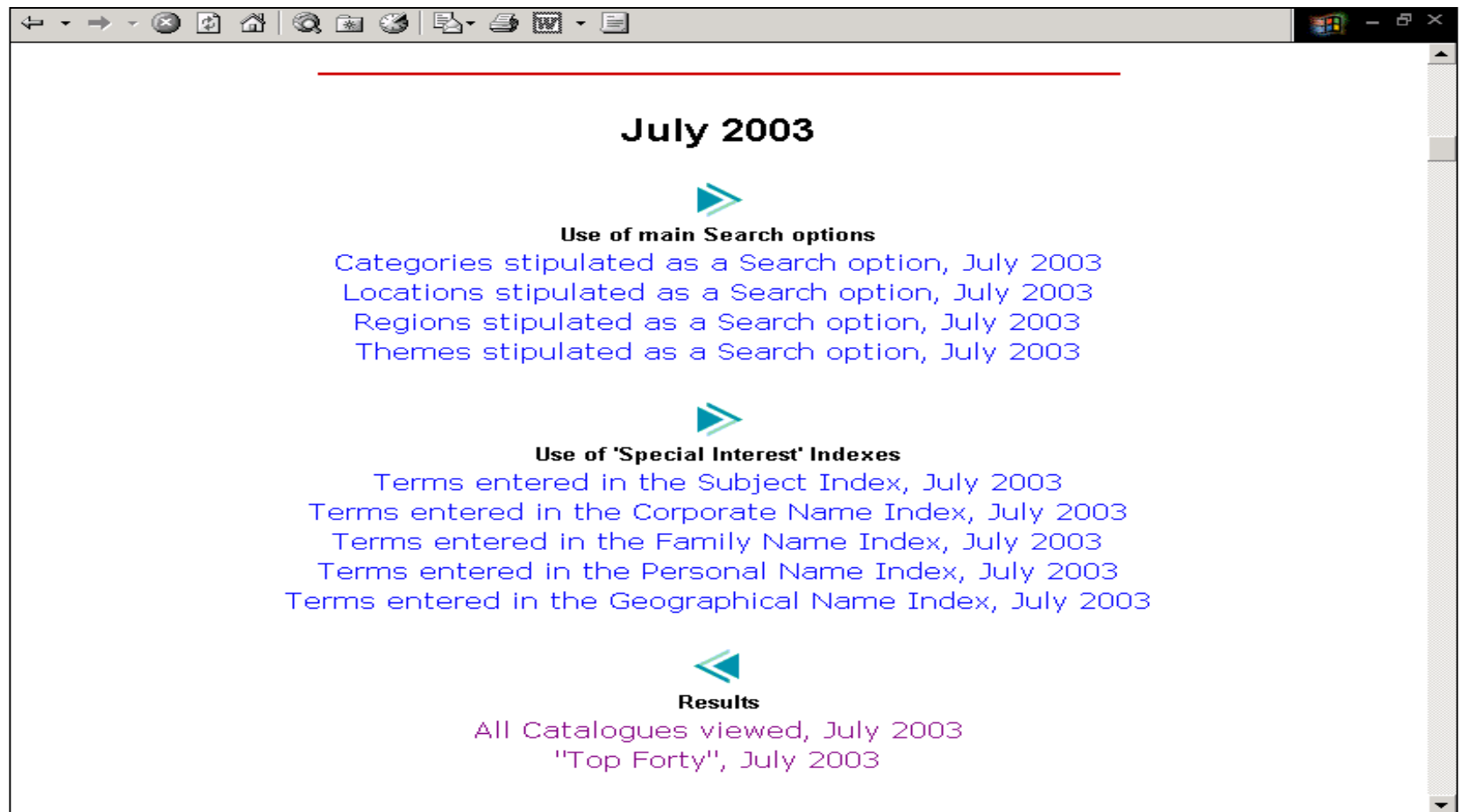
Heritage focus

- Sell your project! Bring it alive!
- Why is it of local, regional, national importance?
- Interest and unique points
- Link this back to the users
- Use examples to illustrate this

Need and demand

- Current state of collection
- Uncatalogued or paper index
- Split locations in partnership bids
- Remote access
- Demand for these collections
- Evidence for this
- Under used – outreach needed
- Use and success of A2A – current stats and usage

A2A statistics



The screenshot shows a web browser window with a toolbar at the top. The main content area is titled "July 2003" and is divided into three sections by teal arrow icons. The first section, "Use of main Search options", lists four categories: Categories, Locations, Regions, and Themes, all stipulated as search options. The second section, "Use of 'Special Interest' Indexes", lists five terms entered in various indexes: Subject Index, Corporate Name Index, Family Name Index, Personal Name Index, and Geographical Name Index. The third section, "Results", lists two items: All Catalogues viewed and "Top Forty".

July 2003

➤

Use of main Search options

- Categories stipulated as a Search option, July 2003
- Locations stipulated as a Search option, July 2003
- Regions stipulated as a Search option, July 2003
- Themes stipulated as a Search option, July 2003

➤

Use of 'Special Interest' Indexes

- Terms entered in the Subject Index, July 2003
- Terms entered in the Corporate Name Index, July 2003
- Terms entered in the Family Name Index, July 2003
- Terms entered in the Personal Name Index, July 2003
- Terms entered in the Geographical Name Index, July 2003

◀

Results

- All Catalogues viewed, July 2003
- "Top Forty", July 2003



A2A statistics

**Catalogue Files requested following a search
June 2003**

**A Access
2 to
A Archives**

222713 Catalogue files requested (in total) following all searches in June 2003

214780	viewing HITS IN CONTEXT	96.43 %
5952	viewing WHOLE CATALOGUE	2.67 %
1981	viewing TABLE OF CONTENTS	0.88 %
15815	Lancashire Record Office	7.101 %
12514	Devon Record Office	5.618 %
12445	London Metropolitan Archives	5.587 %
11078	British Library, Oriental and India Office Collections	4.974 %
8991	Somerset Archive and Record Service	4.037 %
7796	Norfolk Record Office	3.5 %
6717	Shropshire Records and Research Centre	3.015 %
5936	Birmingham City Archives	2.665 %
5897	Bedfordshire and Luton Archives and Record Service	2.647 %
5553	East Sussex Record Office	2.493 %
5510	Warwickshire County Record Office	2.474 %
4934	Worcestershire Record Office	2.215 %
4742	Gloucestershire Record Office	2.122 %

YH Scheme Priorities

- The project will conserve and enhance our diverse heritage
- *Or* the project will encourage communities to identify, look after and celebrate their heritage
- *And* the project will increase opportunities for learning about heritage
- *And* the project will open up heritage resources and sites to the widest possible audiences

Have you provided the evidence?

- What advice have you taken in planning the project?
- Whose professional support do you have?
- What expertise did those planning the project have?
- Is the project best practise in all aspects?
- What considerations have been taken on environmental issues?



A2A Programme Standards

- ISAD(G) 2 minimum conformity – for retroconversion **and** new cataloguing (handouts)
- Indexing (handout)
- Digital images (handout)
- NCA *Rules* for construction of names
- UNESCO *Thesaurus* for subjects
- EAD for data exchange – NB xml and Government Interoperability Standards
- Quality control

Have you provided the evidence?

- Experience of previous successful projects?
- Or similar projects?
- Appropriate people and organisational skills and experience to complete the project?
- Or access to these?
- Considered post project management too?
- Including forward plan for any additional running and maintenance costs?
- Is it realistic?



A2A Central Team

- Editorial oversight and training
- Standards application, searching metadata
- A2A Stakeholders Meetings
- A2A Steering Group
- National publicity and outreach

Sustainability

- A2A catalogues are EAD XML files:
 - Data is 'platform-independent'
 - Data can be exchanged and migrated
- TNA is committed to maintaining the A2A website
- TNA has allocated resource for the A2A Central Team in Phase 3

Project Timeframe

- Application process
 - Drawing up bid
 - Awaiting decision
- Workflow:
 - Mark-up/cataloguing
 - Initial check by Central Team
 - Rekeying of mark-up / export of new catalogue data
 - Mounting in A2A database
 - Checking as required
 - Catalogue data returned to A2A projects

Project Planning and Management

- Retroconversion:
 - Count pages exactly
 - Count catalogues exactly (shorter catalogues have resource implications)
 - Don't include catalogues already submitted to A2A
 - Catalogue pages per person per day:
 - from c 60 for simple lists ...
 - ... to c 120 for complex lists
 - If looking at 'born digital' catalogues: consider resources for conversion

Project Planning and Management

- New cataloguing:
 - Cataloguing timescale – affected by depth of description
 - Calculate paper page equivalents
 - Salaries of staff should reflect qualification and experience required
 - Managers need supervisory experience

Project Planning and Management

- Digital images:
 - Need to be linked to an A2A catalogue
 - Need a local drive to sit on
- Interpretation:
 - Include time to deliver website or other resource

Project Planning and Management

- Recruitment of staff
- Training from Central Team
- Outreach and publicity activities
- Communication and partnership
 - Central Team
 - when drawing up bid – we can help
 - during delivery of project – we need to know
 - Colleagues and consortium partners



A2A Central Team

- Bid co-ordination, advice, support
- Editorial oversight and training
- Standards application, searching metadata
- Website, hardware, software, maintenance, searching, reporting
- Management of keying contract
- Outreach, publicity, marketing

Your contribution

- Consortium co-operation
- Proposals that meet HLF criteria
- Partnership funding, in cash and kind
- Preparation of material
- Quality control
- Local publicity, and development

Your Heritage Scheme Finances

- Total project costs under £100,000
- Smallest grant £5,000
- Largest grant of £50,000
- Can apply for revenue and capital funding
- Partnership funding is 'give what you can'
- Used to be minimum 10% partnership funding of which 5% must be in cash

What can you ask for?

Total Project Costs	£20,000	£35,000	£50,000	£80,000
Maximum grant request (%)	£20,000 (100%)	£35,500 (100%)	£45,000 (90%)	£50,000 (62.5%)
You must obtain this balance (%)	Give what you can		£5,000 (10%)	£30,000 (37.5%)

Budget

- Checklist 4 – full breakdown of the project costs divided into capital and revenue – using the HLF headings
- Checklist 5 – evidence of how you have worked out the project costs.
- Checklist 6 – proof of other financial contributions to the project
- Checklist 13 – provide evidence of sunk costs



TNA A2A Central Team Contribution

Total in kind contribution:

£33,000

**Total number of pages over 15
months:**

150,000

£33,000 divided by 150,000

= 22p per page

Have you sent in everything?

- Constitution – trust deed etc
- Organisational chart
- Accounts
- Project costs breakdown and evidence
- Partnership funding
- Photographs and other illustrative materials
- Letters of support



Policy Checklist

Education Policy

Access Policy

ICT Policy

Conservation Policy

Equal Opportunities Policy



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