

# **The National Archives' user consultation methods and procedures: a review**

## **Terms of reference (draft)**

### **1. PURPOSE**

The project aims to review the various different methods used to consult with users of The National Archives, to make sure that these methods provide the most effective means of consulting with users of The National Archives and of gaining their feedback and contribution.

This includes consideration of the extent to which the current arrangements allow users to make an effective contribution, and also the extent to which the arrangements represent the needs of the organisation and our disparate users.

It also includes ensuring that the users themselves feel that they are able to contribute and that their contributions are valued.

### **2. BACKGROUND**

The National Archives is committed to consulting with and gaining feedback from its users. The mechanisms with which we do this have never been formally reviewed as a whole, and individual forums have not been reviewed for at least two years.

The recent changes made through the TNA 2010 project highlighted the need to ensure that the mechanisms for user consultation are as effective as possible for both users and The National Archives.

### **3. OBJECTIVES**

- To review the user consultation groups that fall within scope, gaining input from both group members and staff at The National Archives, and gauging to what extent the groups are a representative sample of the users they are intended to represent
- To gain input from users who do not attend any of the current user consultation groups, to find out why they do not do so and which (if any) alternative methods they use to give feedback / contribute
- To benchmark The National Archives' user consultation and feedback mechanisms against other institutions
- To review the procedures in place around responding to complaints, compliments and suggestions made outside the user consultation groups, including through the website and via on site and online survey

- To investigate informal methods currently used to consult with users, including one-to-ones, bespoke meetings with particular groups
- To put forward recommendations to ensure that the methods for user consultation are as effective as possible and represent as broad a spectrum of our users as possible. This includes ensuring that they offer best value in terms of internal resource (both financial resource and staff time)

#### **4. SCOPE**

The following are in scope:

- The user forum
- The online user advisory panel
- The cataloguing strategy panel (diversity and inclusion)
- Complaints, compliments and suggestions procedures (including online comments to Webmaster form and online Catalogue improvements form)
- Informal / ad hoc meetings and one-to-ones
- On site and online surveys

Where appropriate, the mechanisms in place to record, report on and advertise these methods of consultation will also be reviewed.

The following are out of scope:

- Focus groups organised to consult on particular projects / strategies
- Remote enquiry services
- Marketing and Communications activities (e-newsletter, press events etc)
- Methods of communication / consultation with Friends and volunteers
- Chartermark / Customer Service Excellence standard
- Web contact forms (other than for complaints, compliments and suggestions form, and comments to Web master, and suggestions for Catalogue improvements)

#### **5. CONSTRAINTS**

While all interested parties will have the opportunity to input via some means, constraints of time mean that we cannot guarantee to meet all interested parties face-to-face individually.

## **6. DEPENDENCIES**

Chartermark / Customer Service Excellence Standard: the review will consider the impact of any changes on this standard (and successors) to ensure that we continue to maximise our chances of retaining it.

## **7. ROLES & RESPONSIBILITIES**

Jess Nelson, Internal Communications Manager, will be leading the review project. She will be supported by the owners of the in-scope groups, and colleagues in Public Services Development.

## **8. REPORTING**

Jess Nelson will report directly to Jeff James, Director of Operations and Services, on this review. The results of the review will be presented to interested colleagues and to the user consultation groups.

## **9. METHODS**

The review will include the following (this list is intended to be flexible, and new methods may be added):

- Meetings with other organisations for purposes of benchmarking
- Review of current terms of reference of user consultation groups  
Comparison of terms of reference with minutes of actual meetings
- Review of published procedures for dealing with complaints, compliments and suggestions
- Online surveys
- Meetings with members of staff involved in the user consultation (both formal and informal channels)
- Meetings with members of staff who deal with any users currently under-represented by current methods of consultation
- Focus groups and one-to-one discussions with users (both those who use current methods of consultation and those who do not): note that constraints of time and resource mean that it may not be possible to speak face-to-face with everyone who would like to take part

## **10. DELIVERABLES**

Results and recommendations of review in presentation format  
Written recommendations

## **11. MILESTONES AND DEADLINES**

Review of written materials, published procedures and online forms completed by end March 2010

Review of on site and online surveys completed by end April 2010

Online surveys completed by end May 2010

Focus groups and interviews completed by end July 2010

Presentation and recommendations completed by end September 2010