

User Participation Update

Background

'For the Record. For Good. Our Business Plan for 2011–2015' set out TNA's user participation/collaboration ambitions under the strategic priority 'We will provide a record that is more open, inclusive and used than ever before'. Specifically:

- Develop and commence implementation of a new User Participation strategy for The National Archives, bringing in new volunteers, communities and partners
- Share technologies and business processes with the whole archive sector

Subsequently Executive Team approved an Investment Bid (IB1112-23) for User Participation, together with a budget of £100k for 2011/12.

Progress to date

A Steering Group was established to develop the User Participation Strategy, comprising membership from across TNA, including:

- Public Services Lead
- Resource Discovery/User Collaboration Lead
- Collection Care/NADFAS
- Education & Outreach/Lifelong Learning
- Wider Archive Sector Lead
- Academics
- User Experience/Consultation
- Marketing and Communications

The group has met several times over the last 2-3 months and having agreed 'Terms of Reference' identified a number of work-streams, in support of the development of the strategy, including:

- Wider Picture (Strategic context; External & Internal)
- Engagement (on strategy development and User Participation activities)
- What We Could & Should Do (possibilities & business need evaluation)
- Motivations (of Volunteers and Non-Volunteers)
- Value/Evaluation of Existing Participation/Collaboration

Work-stream members have conducted general research, background reading

and relationship building across the core areas. A methodology for engagement was identified and draft communications approved; a 'motivation surveying brief' was also agreed and the 'Volunteering England' template was selected as an appropriate tool to review the success of existing volunteering activities.

A draft set of commitments/guiding principles were identified:

Our commitments/guiding principles [Where do we want to be?]

Analysis

- We will have developed an understanding/appreciation of what motivates people to volunteer generally and at TNA
- We will have identified and evaluated exemplars of good/best practice and incorporated such practice when developing the strategy
- We will have learnt from the past by assessing previous participation activities, seeking to replicate the positive and eliminate the negative experiences moving forward

Opportunity

- We will have objectively assessed participation opportunities against pre-determined and weighted business needs/benefits
- We will have developed a portfolio of volunteering opportunities for individuals and/or groups to consider/explore

Engagement

- We will have engaged with individuals, groups, communities and partners on the development and implementation of the strategy
- We will have built and nurtured new and effective online collaboration communities
- We will have developed partnerships with other bodies in the public, private and/or third sectors

Delivery

- We will have identified a set of deliverables for 11/12 with clear success criteria/benefits that can be measured and a high level package of activity for the remainder of the 4-year strategic plan
- We will exploit new technologies to add descriptive online content to our holdings
- We will work with these individuals, communities and partners to more generally shape, enrich and help deliver our public services
- We will be flexible and agile in our approach to delivering participation activities, re-prioritising, as necessary, according to changing business need
- We will have established an effective governance structure to manage associated risks, provide assurance and monitor performance, as appropriate
- We will develop 'Best practice' approaches, which can be used by the wider sector to build cost effective new services

'The Matrix'

At this stage, conscious of the need to agree and progress 11/12 business opportunities, the Steering Group reconstituted to consider 'What We Could & Should Do', objectively assessing participation opportunities against pre-determined and weighted business needs/benefits.

Consequently, User Participation proposals were sought from across TNA. In total 23 potential activities were identified and assessed against 11 business criteria:

- Leadership in Archival Sector
- Innovation/ Quick Wins/ Proof of Concept
- Financial Benefit (Direct/ Indirect)
- Financial Cost (Direct/ Indirect)
- Value Add (e.g. delivering talks, descriptive catalogue content; considers value to both business and customers)
- Outreach/ Diversity
- Relationships & Partnerships
- Government Drivers (e.g. Big Society)
- Core Business (e.g. preservation, basic catalogue descriptions, welcome desk; considers value to both business and customers)
- Obsolescence (i.e. opportunity to stop obsolete services or products)
- Reach

Proposed activities were assessed against each weighted criterion and scored (typically 0-10) by individual Steering Group members. Proposers were then invited to present their proposals at a 'Workshop', subsequent to which Steering Group members re-scored, again individually, according to the collective discussions. Final individual scores were then aggregated and each activity given an overall weighted score out of 10.

Following lively discussion and debate, those proposals which scored greater than 5 out of 10 were given support as 'User Participation' activities. Eight (8) activities scored 5.0 or above, including:

- Online user generated catalogue descriptive content through the Discovery service
- Through a Lens: Caribbean. In-depth consultative use of digitised images
- User generated folksonomy through the Discovery service
- Through a Lens: Americas, Asia, Oceania & Pacific, Middle East and Mediterranean and Island Territories. A rolling programme making the CO1069 collection available online.
- Titanic (Online)
- Defined Conservation Projects for Students
- Online user generated geo-tagging to enhance place data through Discovery service
- Basic Conservation Activities

Next Steps

- Discuss progress to date and agree methodology/approach with Executive Team (Jun 11)
- Discuss progress to date and methodology/approach with the newly established User Advisory Group

- Continue developing the User Participation Strategy in collaboration with Users/Key Stakeholders (Jun - Sep 11)
- Establish a User Participation Programme Board to provide governance for the eight 11/12 business opportunities (Jun 11 onwards)
- Continue to evaluate other User Participation possibilities against the matrix, as identified (Jun 11 onwards)
- Report progress to Executive Team and/or Management Board, via usual mechanisms (Jun 11 onwards)

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