Title: User Advisory Group
Date of Meeting: Tuesday 3rd December 2019
Location: The Swan Room, Kew

Attendees:

Staff
Lee Oliver (LO) – Head of Venue Management & Services
Caroline Ottaway Searle (COS) – Director, Public Engagement (Chair)
(DF) - Resource Access & Advice Programme Manager (item 2)
Tom Gregan (TG) - Head of Document Services (item 2)
Tina Morton (TM) - Head of Regional and Networks Team (item 3)
(DP) - Document Production Coordination Manager (item 2)
(AV) – Personal Assistant (minutes)

Delegates
Sue Adams (SA) – Independent Researchers
Adam Chambers (AC) - Map Room Users
Nadine Chambers (NC) – Student Users
Mike Grahn (MG) – On site Personal Interest Users
Sophie Kay (SK) - Diversity and Inclusion
Camilla von Massenbach (CvM) - Online Family Historians

Apologies
Amelia Clegg (AC) – Student Users
Stephen Daglish (SD) - On line Users
Francis Howcutt (FH) – Family History Societies
Val Johnson (VJ) – Director, Research & Collections
Grace Ioppolo (GI) – Academic Users
Geoff Monks (GM) – Academic Users
Will Reid (WR) - Diversity and Inclusion
1 Minutes, matters arising and general updates

1.1 The minutes of the 24th September 2019 were approved
1.2 Action following item 3.7 (International Strategy - percentage of UK overseas development budget allocated to archives). COS advised that there is currently no designated budget for archives but TNA are looking further into this.
1.3 Action following 8.1 (AOB - reading room computers timing out). Action: COS to follow up with DP and revert.

2 Changes to document ordering and other services in 2020 (DF, TG and DP)

2.1 TG advised that the changes will be introduced as a pilot from March 2020 as part of a gradual movement from an ‘on demand’ to an advance ordering service. On demand ordering has reduced from 80% to 50% of orders with little impact on user groups and TNA would like to extend this.
2.2 DP explained how user data taken from DORIS had been analysed to inform the decision. Of the daily orders from April to July 2019 there were 120,000 productions for approximately 5,000 users. Of the top 200 users, the percentage of advance orders (excluding bulk orders) showed that only around 1% of users may need to adjust how they place orders under the new model. The top 200 users were analysed on frequency of use; 50 users never used advance orders, half used it rarely. The remaining group used advance orders frequently. This showed that the two groups to be most impacted would be i) those who had done little preparation prior to their visit, ordering documents in batches and ii) those unaware of service. TNA will therefore be increasing communications to encourage its use. Each year around 450,000 public productions are delivered, two years ago 100,000 of these were advance/bulk orders but last year this had doubled to 200,000 and for 2019 is anticipated to be around 230,000. This demonstrates a natural readership trend supporting the change.
2.3 An average of 8 documents are ordered each day by users. Under the current model a maximum of 12 documents may be ordered on the day over 5 ordering slots. The advance orders remain at 12 documents per day, with the facility for readers to order up to 12 additional documents on demand per day. This gives the maximum total that readers can view in a day as 24 (excluding bulk orders). A small proportion of readers (10%) place 30% of each day’s orders including overseas visitors. The majority of users will not be impacted by the changes
2.4 A frequent complaint from users has been that only 3 documents can be ordered at a time – the new system enables users to order twelve. This is also more efficient for document retrieval as the system sorts the references enabling one circuit of the repository only.
2.5 CVM asked if increasing volumes of advanced orders would create challenges for storing documents on the floor. DP advised that additional racking has been already installed in the map room and there is an overflow space behind the reading room locker area. TG advised that the changes made are part of the trial so if improvements are needed they can be made.
2.6 COS commented that the new model is also more efficient for users as they can plan in advance they wish.
2.7 DF updated the group on enhancements to the enquiry service. The former first level research phone line service was resource intensive, requiring high levels of staffing to meet targets. A live chat facility was introduced six months ago. This enables reader advisers to monitor trends, be more responsive to users and deal with more than one user at a time. CEE advisers have been using this facility for a while. The system can tell advisers which web pages users are looking at which helps to tailor their advice. Training has been given to staff to help them with the new system and feedback from readers so far has been positive. Users can save and be mailed a copy of the chat transaction for their records.
2.8 TG confirmed that after staff training in January the trial would start on 31 March and run for 6 months until the end of September.
2.9 NC asked what steps could be taken to ensure that users do not re-box their multiple advance orders incorrectly. TG advised that rules for users accessing records from their locker will not change, i.e. users can only access one box or 3 files per time.

2.10 NC asked how statistics would be compiled for the chat to show how TNA is serving users. DF advised that monthly remote statistics are compiled for CEE and DSD by contact type, i.e. phones, emails, letters and chat. A dashboard pulls together statistics on user satisfaction by types of enquiry.

2.11 SA commended the removal of the 3 document limit but asked how many users typically arrive early before the first delivery slot and not having completed any pre-planning. DP advised this is a minority – barrier time analysis shows there is a slow start to the day building after 10 am and with users tending to depart around 3.30 pm. DP confirmed that advance orders can be made on site and that these are being encouraged along with reservation of documents from day to day.

2.12 SA asked whether the change may prompt users to over order. DP advised that as the average order is 8, i.e. still below the maximum, he does not anticipate an issue with this.

2.13 MG asked whether, given the early cut off of 3.30 pm for next day delivery, there could be another time e.g. by 9 am the previous day for next afternoon delivery. DP advised that this had been trialled previously but had proved confusing for users so it was dropped. There is a six week window of ordering. There is no basket facility at present but this is being looked into. In the meantime, every document available on ‘Discovery’ has an advance order button. However, removals from an advance order currently requires assistance from the DSD team.

2.14 TG advised that the combination of offering the bulk and advance ordering services is to enhance user’s experience in getting the best value from TNA’s service whilst balancing the demands of record maintenance.

2.15 SA asked what plans were in place to reach different user demographics about the trial. DP advised infrequent users will be the most challenging to reach. Regular and new users will be contacted via email. A mailshot of the information on the website will be sent to all users who have given email address. On site an A5 form will be available within the reading rooms for feedback. A letter will be sent out to users in early January. Signage will be provided in reading rooms.

2.16 NC commended the changes in advance ordering and the chat facility especially in helping the students navigate Discovery and to visit Kew.

2.17 COS invited the team to return to UAG next year and report back on the trial. She also asked for delegate’s assistance in promoting it across their networks.

3. ‘Discovering Collections, Discovering Communities’ 2019 – highlights and feedback (TM)

3.1 This year’s theme was ‘Navigating the Digital Shift’. Approximately, 400 delegates, including archivists, librarians, heritage professionals and academics attended to explore, collaborate and network.

3.2 TM highlighted new features for this year:
   - Four bursaries were awarded by TNA and free places offered to trainees on the ‘Bridging the Digital Gap’ programme courtesy of an HLF grant. The bursary winners and trainees had lunch with Jeff James where they talked about their experience on the programme.
   - The first cohort from the Professional Fellowship Scheme (run jointly by TNA and Research Libraries UK) held poster sessions with interviews with Valerie Johnson and Jeff James.
   - There was a greater focus on practical advice including sessions run by the Library and Archive Copyright Alliance and a Funders Market Place.
   - ASD ran a drop in workshop on ‘Manage your Collections’ to promote the addition of catalogues to Discovery.

3.3 The traditional breakfast briefing hosted by Jeff James and Val Johnson was well attended. This focused on ‘Archives for Everyone’, ‘Archives Unlocked’ and how TNA’s strategic plan aligns with our vision for the sector.
3.4 Preconference workshops were held at the Library of Birmingham, the Birmingham Museums Trust Collection Depot and included a tour of the Museum of the Jewellery Quarter.

3.4 Feedback is still being received but so far 93% of attendees have rated the conference as 4 or 5 on a maximum scale of 5 and key note speakers have been rated as excellent.

3.5 NC advised that both she, SA and FH had attended. There had been a good variety of topics and no repetition of material from 2018. The awarding of the travel grants and bursaries was particularly welcome. The venue was great. NC had received feedback that more representation from the museum sector and junior members of the archive profession would have been welcome. The tone was collegiate and welcoming. TM confirmed that post and under graduates and early career researchers will be a focus for increasing attendance in the future.

3.6 SA felt more commercial partners could have attended. TM confirmed academic publishers had strong attendance but invitations to other partners had not been accepted. It was agreed that commercial partners do not prioritise outreach work and TM reminded that attendance from such partners is voluntary – the team will continue to work on this.

4. Tour of the Cabinet Table recreated for 9th November 1989 and ‘1657: Rebel Christmas’ experience (COS)

4.1 This item was not minuted.

5. Delegate Submitted Items:
5.1 Provision of assistance and welcome given to deaf users (NC). NC recently encountered a signing visitor to TNA who felt that the digital posters by the locker rooms could be of particular benefit to the deaf community and used to display their stories. COS advised that the last meeting of the Equality and Inclusion forum had looked at considerations for deaf users and particularly how to ensure their safety in the event of building evacuation. British Sign Language training had been run regularly at TNA until 2012 but it is a demanding course and users have either since left or used intermittently resulting in a degradation of the skill. The forum debated investing in reviving this training and how to keep it in practice. Deaf awareness training has been run regularly, however there has been little demand for deaf services from the public. It has been proposed to consider creating a directory for signers so that they can be called upon. Greater signage to advertise that TNA has signers available to assist would be welcome and a step free route to station. AS suggested that disability facilities should be outlined when applying for reader’s card online. Action: LO to take this forwards and COS to pass NC’s comments on.

5.2 MG asked if hearing loops are provided. LO confirmed that these are available and signposted in the Events Space and at Inquiry Points. The positioning of magnetic fields in the Map Room means that it is not possible to have one by that desk.

6. Forthcoming Events and Any Other Business:

6.1 COS advised that the ‘With Love’ season opens in the New Year with an exhibition of letters. Work on Project Alpha, which is working to upgrade TNA’s website continues and the group will be kept informed on progress. The pilot on document ordering will commence in January. In respect of the next decade, a critical piece of work to publish the 1921 census in 2022 is ongoing.

6.2 AOB. SA has an outstanding query on how independent researchers may be added to TNA’s list. Action: LO is awaiting a response from the relevant TNA colleague and will revert.

7. Next Meeting;
   Tuesday 3rd March, 12.00 – 14.30

* * * * *